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ABSTRACT

This publication is intended to help schools develop and implement comprehensive reform initiatives. It provides an overview of comprehensive school reform and offers suggestions for selecting and implementing research-based instruction, which includes a step-by-step process for selecting and adopting research-based instructional methods that are appropriate for a school or district. The booklet demonstrates how to invigorate education by reinventing staff development. It advocates the use of standards to set clear student goals, such as defining what students should know and be able to do, and then assessing these accomplishments. Each chapter discusses a particular aspect of successful comprehensive reform and can serve as a resource for understanding the key ingredients needed to bring about comprehensive change. All eight chapters present the results of interviews with education leaders and are organized around eight comprehensive school reform program characteristics. The document discusses how visionary leadership can transform schools and gives tips for bringing the public back to public schools. It shows how to evaluate comprehensive school reform initiatives and highlights some innovative approaches to maximizing resources. The text concludes with strategies for aligning the components of comprehensive school reform with successful strategies. Throughout the booklet, successful programs are positioned as models for future reforms. (RJM)

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Noteworthy

Perspectives on Comprehensive School Reform

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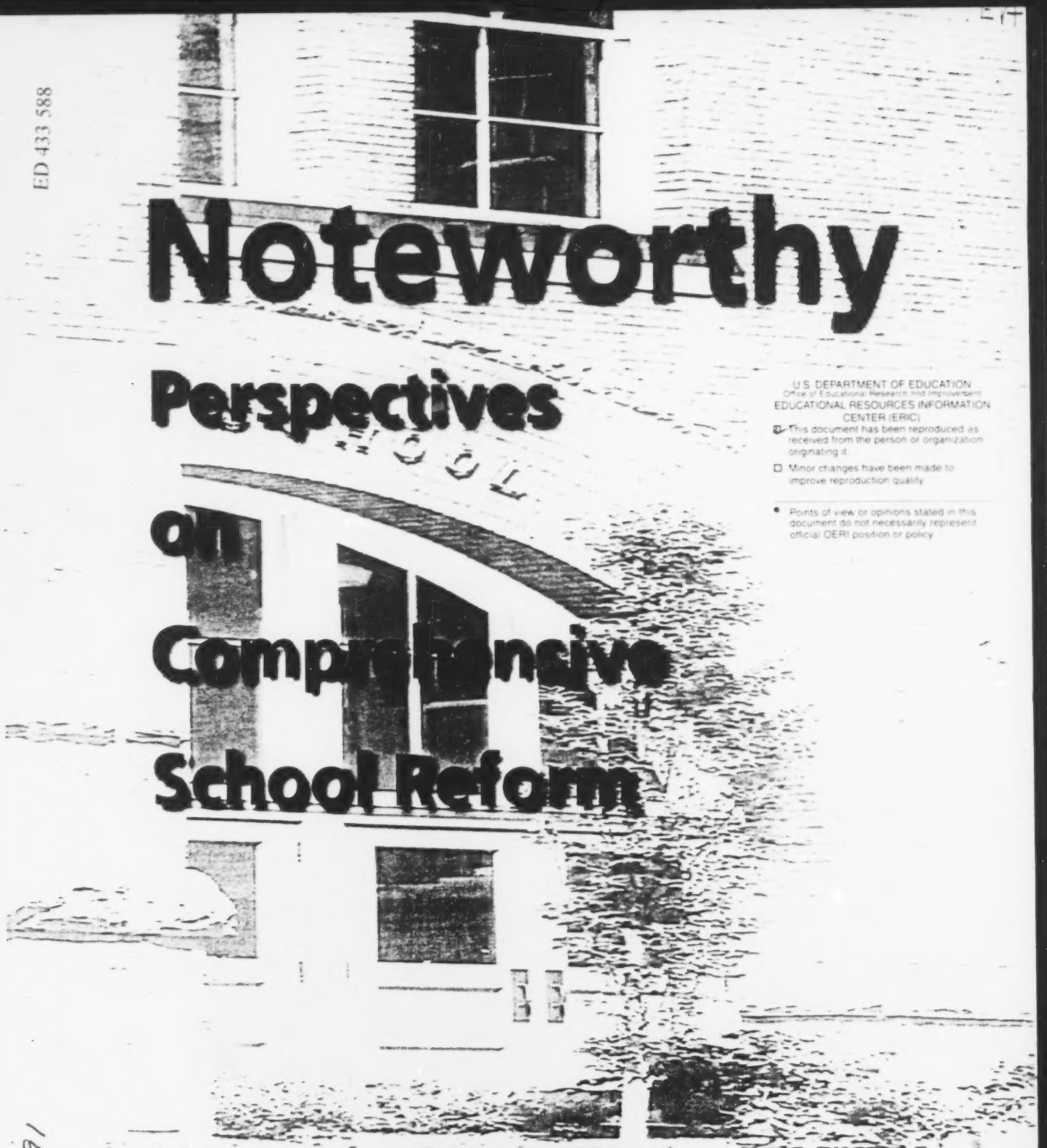

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McREL
Mid-continent Regional Educational Laboratory

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To the reader:

While this publication is intended to assist all schools with developing and implementing comprehensive reform initiatives, it also is a valuable resource for those states, districts and schools that are participating in the federal Comprehensive School Reform Demonstration (CSRD) program. CSRD is a three-year effort created under the 1998 Labor-HHS-Education Appropriation Act. The program provides financial incentives to targeted districts for implementing research-based comprehensive models as the core of their reform programs, with the goal of substantially improving student achievement.

McREL is participating in the CSRD program by assisting states, districts and schools in its seven-state region. That assistance includes dissemination of information about various research-based reform models. In addition, McREL is providing guidance to local jurisdictions on conducting needs assessment, selecting appropriate models, sustaining implementation and evaluating progress and results. The chapter topics in this issue of *Noteworthy* closely parallel the criteria established for qualifying comprehensive reform models.

To obtain more information about the CSRD program and other related resources, visit our Web site at www.mcrel.org. Specific inquiries and questions can be directed to McREL's CSRD project e-mail hotline: csr-info@mcrel.org.

Gail Clark
McREL CSRD project coordinator

We want to hear your feedback about this issue of Noteworthy!
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Chapter 1

What we know about comprehensive school reform

— by McREL Deputy Director Louis F. Cicchinelli

To some, talking about comprehensive school reform may bring to mind Yogi Berra's famous quotation: "It's deja vu all over again." Buzzwords like "continuous school improvement," "effective schools," and "whole school reform" have come and gone. Indeed, they seem to "erupt noisily every decade or so, often only to recede quietly into the background" (Murphy, 1990).

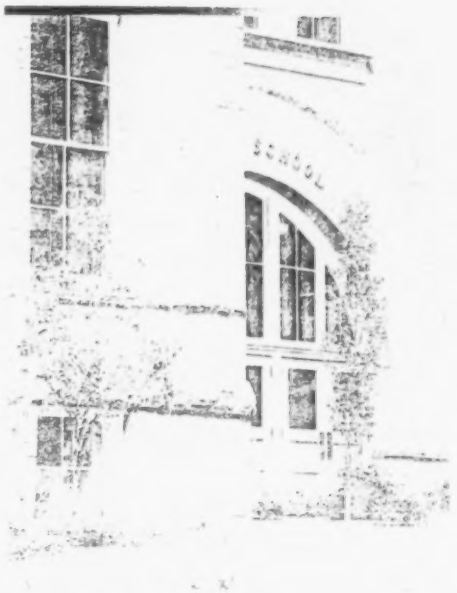
So why should these latest buzzwords, "comprehensive school reform," be any different?

In many ways, the notion of comprehensive school reform is not new. At least the pieces that make up what's called comprehensive reform aren't new. They've all been discussed, studied and tried before. It's also true that we've failed to sustain successful innovations in the past. However, comprehensive school reform attempts to move us beyond those individual failures by bringing together everything we've learned so far about creating better schools.

A brief history

Our initial attempts to reform schools in the 1960s and '70s set out to fix the "broken" parts of schools. We created individual pieces of reform, like better math and science curricula, then tried to plug them into schools. Sometimes fixing the parts also was seen as a matter of fixing the people. The thinking was that poor student performance was caused by the "poor quality of the workers and ... the inadequacy of their tools," which were both in need of fixing (Murphy, 1990). These experiences taught us that the content and delivery of instruction are linked in important ways that affect student results.

Simply fixing the parts, however, didn't work. For example, the Ford Foundation's Comprehensive School Improvement Program was based on the premise that adopting a slew of changes would create "a chain reaction of change that would overcome the inertia of school systems." Only later did the Foundation realize its approach failed to take into account outside factors such as financing, parents' expectations and local political pressures. Still, experiences like the Ford Foundation's taught us some important lessons about how to improve teaching and curriculum, as well as how to support such changes with professional development.



In the 1980s, we decided to shift the focus from fixing the parts to fixing the whole school. We mandated reforms, such as new teacher standards, higher pay for teachers and school report cards. Those reforms, however, still had only a limited effect (Fuhrman, Elmore, & Massell, 1993). As some observers put it, we were still just tinkering at the edges, but not getting at the heart of the problem — the education system itself. In 1988, David Kearns, the chairman and CEO of Xerox Corp., wrote that a wave of reform had "broken over the nation's public schools, leaving a residue of incremental changes and an outmoded educational structure still in place." Nonetheless, while our mandated reforms didn't produce the silver bullet we hoped for,

... change can only happen when teachers, administrators and parents believe in it and feel they have a part in it.

we did learn about aligning legislative and district policy to stimulate school change.

By the 1990s, it seemed clear that we needed to rethink and revamp the whole education system — from the classroom to the district office to the statehouse. That is the essence of comprehensive school reform. It goes beyond our past, piecemeal efforts by not just combining them, but integrating them. Comprehensive reform borrows from what we learned in the 1970s about effective curricula and teaching. And it combines a top-down policy and bottom-up approach in the form of standards-based reform, like reforms in the 1980s (Sashkin & Egermeier, 1993).

Comprehensive school reform also takes into account another lesson we've learned: that change can only happen when teachers, administrators and parents believe in it and feel they have a part in it. So it's not surprising that many of the comprehensive school reform "models" that have emerged demand that change be based upon a shared vision of what the school should become.

While all the pieces of comprehensive school reform may not be new, our understanding of how to put the pieces together in a way that can change schools for the better is new. Like any other pursuit, education is evolving. So it's natural that the buzzwords we use to capture our latest understanding of how education works are changing, as well.

History shows us that contrary to the adage — "the more things change, the more they stay the same" — education has changed. Many parts of it have changed for the better; statistics bear evidence that our reform efforts haven't been futile.

For starters, standards-based reform has caught on. Virtually all states have either adopted or are in the process of developing statewide content standards (Gerald, Curran, & Olson, 1998). In addition, as a result of reforms in the 1980s, high school students are taking more courses and more difficult courses. Between 1982 and 1994, the percentage of graduating high school seniors who took four years of English and three years each of social studies, math and science nearly quadrupled — from 12.7 to 50 percent (U.S. Dept. of Education, 1996).

It's perhaps no coincidence that math and science scores of 17-year-olds on the National Assessment of Educational Progress (NAEP) rose significantly between 1982 and 1996 — from 298 to 307 and 283 to 296, respectively. Those increases represent gains equivalent to a year or more of learning (U.S. Dept. of Education, 1998).

Efforts in the 1980s to raise teachers' salaries also resulted in positive changes. The average teacher's salary rose from $32,711 (in 1997 dollars) in 1981 to $38,921 in 1997 (U.S. Dept. of Education, 1998).

Despite these successes, there is still much cause for concern. Our student scores on the NAEP remain low compared to those in other countries. Achievement of urban students is abysmal, as well. Most fourth-graders in urban districts can't read simple children's books, and most eighth-graders can't use math to solve a practical problem (Gerald, Curran, & Olson, 1998). Likewise, troubling achievement gaps between minority and non-minority students still exist.

Practical insight

This issue of *Noteworthy* is intended to provide guidance to district and school staff in implementing comprehensive school reform programs. The following chapters present reviews and syntheses of a set of eight comprehensive school reform program characteristics.[1]

Regardless of whether your district or school chooses to pursue federal funds for comprehensive school reform, implement a Title I schoolwide program, or design its own reform strategy, this issue of *Noteworthy* serves as a resource for understanding the key ingredients needed to bring about comprehensive change. Each chapter discusses a particular aspect of successful comprehensive reform and most feature the experience of a school or district from McREL's seven-state region. The chapters and their topics are as follows.

Chapter 2: Selecting and implementing research-based instruction

In this chapter, writer Paula Wenger interviews McREL Senior Associate Diane Paynter about a step-by-step process for selecting and adopting research-based instructional methods which are appropriate for your own school or district.

Chapter 3: Invigorating education by reinventing staff development

In this chapter, writer Peggy Gonder interviews Terry Dozier, a special assistant to the U.S. Secretary of Education, about professional development programs. The chapter also features Montview Elementary in Aurora, Colo., which is one of thirteen schools in the country to receive a U.S. Department of Education award for its professional development program.

Chapter 4: Using standards to set clear student goals

To demonstrate this program characteristic, writer Lyn Chambers interviews McREL Senior Fellow Bob Marzano about creating standards-based schools and districts. She features Wichita, Kan., Public Schools, which have adopted districtwide standards to guide their reform efforts.

Chapter 5: Visionary leadership and support within the school

In this chapter, Superintendent Janet Barry of Issaquah School District in Washington provides writer Diane McIntyre Wilber with her insights on the importance of strong leadership and vision. The chapter also features the experiences of Orchard Public Schools in Nebraska.

Chapter 6: Bringing the public back to public schools

Peggy Gonder interviews David Smith of the Annenberg Institute for School Reform about the process of public engagement. The chapter also features Cody High School, which won a Wyoming state award for its numerous community advisory teams.

Chapter 7: Evaluating comprehensive school reform initiatives

McREL Deputy Director Lou Cicchinelli and Senior Director of Research and Evaluation Margaret Camarena explain how to design and implement evaluations of

A comprehensive school reform program includes ...

1. effective, research-based instructional methods and strategies;
2. high-quality and continuous teacher and staff professional development;
3. measurable goals for student performance and benchmarks for assessing progress which are aligned with state and local content standards and benchmarks;
4. a clearly articulated vision and direction whose goals are met through strong leadership and support within the school;
5. meaningful involvement of parents and the local community;
6. implementation of a plan for the evaluation of school reforms and student results achieved;
7. coordination of available resources and efforts to seek external support as needed;
8. a comprehensive design that assures all aspects of these components are aligned.

[1] In general, these characteristics are consistent with the requirements of the Comprehensive School Reform Demonstration program outlined in the 1998 Appropriations Act. We've taken the liberty of repackaging those nine criteria as eight key issues. (See sidebar.)

school reform. They are assisted by writer Paula Wenger, who interviews Don Burger, a McREL senior associate whose expertise lies in student assessment. The chapter features examples from Jefferson County School District in Golden, Colo.

Chapter 8: Innovative approaches to maximizing resources

To demonstrate and explain this program element, writer Diane McIntyre Wilber provides insights from Don Saul, superintendent of the Thompson R-2J School District in Loveland, Colo. McREL Senior Associates Mike Arnold and Nilda Garcia Simms also lend expertise they've gained while assisting states, schools and districts in the McREL region in responding to the federal Comprehensive School Reform Demonstration program.

Chapter 9: Aligning the components of comprehensive school reform

In this chapter, Lyn Chambers gathers insights from McREL's Executive Director Tim Waters and features Trailblazer Elementary School in Highlands Ranch, Colo.

Most likely, your school program or district is already doing some of these things. Implementing comprehensive school reform doesn't necessarily mean starting over. However, you may need to better align, augment and integrate the elements already in place to create an effective comprehensive reform program.

Several years down the road, we may have a new buzzword. However, that won't mean that our current understanding of creating better schools will have been proven wrong. It will mean only that we have learned more about making schools successful. Perhaps even more importantly, it will mean we haven't tired of trying to make this nation's schools the best they can be. ☐

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Chapter 2

Selecting and implementing research-based instruction

— by Education Writer Paula Wenger

Diane Paynter works with districts in the areas of standards development, curriculum, instruction and both traditional and performance assessments in her work as a senior associate with McREL. She recalled an anecdote demonstrating the complexities of selecting instructional methods which are appropriate for a particular school.

A curriculum director reported to Paynter that he had attended a conference session in which a high school teacher did a dynamic presentation on a teaching method she developed for her own students. The teacher reported impressive results. Inspired, the curriculum director went back to his district and attempted to implement the teaching method districtwide. The result: frustration and failure.

Why couldn't the curriculum director replicate the teacher's success? The problem, according to Paynter, was the teacher presented her evidence of success based only on her own students, who were demographically very different from those in the curriculum director's home district. The curriculum director didn't stop to ask himself important questions, such as: "Is there any research to support what that teacher was saying? Did the results come from the method or from that teacher's enthusiasm? Was that school population similar to ours? What knowledge base would our teachers need? How would the district need to support their efforts?"

School districts across the country have experienced similar frustrations, in the process running up high costs in time, money and teacher morale. Too often, districts have instituted new methods or programs without asking whether they are based on current and reliable research, whether they are appropriate in the district's setting, and even if they are necessary.

A new method often won't work, explained Paynter, unless there is a conceptual understanding of why, how and when it works.

A variety of research on instructional methods and practices is now available. A number of research-based models and programs have been developed to either specifically address a particular type of school population or to meet particular needs within specified content areas. The challenge is to find well-grounded models, select the ones that are right for a given school, provide training and support for teachers, and collect student data in order to determine progress and make adjustments.

— Chapter 2 at a glance —

Successful schools base their instructional practice and programs on effective, research-based methods and strategies. To be effective, instructional innovations must be grounded in valid research and matched to the context of a particular school. Instructional innovations must be implemented by staff members who have a strong sense of ownership and an understanding of how and why the particular strategy supports student learning.

The process for finding the right instructional strategies starts with identifying what knowledge students should be learning and determining the degree to which students are presently learning this knowledge. The gaps or areas of concern identified should provide the basis for reform. Stakeholders should find out what research is saying about best practices and determine the appropriate instructional practices for their own school or district. For the process to succeed, the school or district must be committed to planning and building capacity, and to sustaining the effort over the long term. Data should be collected to assess progress and guide adjustments to the innovation as necessary.

Using a research-based approach

Paynter has helped a number of schools and districts match research-based instructional methods and practices to the needs of their students, using the following process.

1. Form a steering committee.

The committee should include representation from all stakeholder groups, including administrators, teachers, parents and students. From the first step, Paynter said, appropriate stakeholders should be involved in decisionmaking and planning, and their participation should continue throughout the entire process of selection and implementation.

The committee should ask difficult questions about student learning and the degree to which current curriculum,

instruction and assessment practices are having a positive or negative effect. Questions to be answered: Who should be on this committee? What is the committee's purpose? How long should members serve? When is it appropriate to involve other stakeholders? How will decisions be made?

It is an expectation that this steering committee will develop an understanding of current best practice, then make recommendations, form working committees, collect and analyze student data, and challenge and revise current programs and practices.

2. Determine what knowledge students should be learning.

Paynter said schools should clearly define the content knowledge and life skills students should know, understand and be able to do. Effective use of research-based methods starts with the identification of what students should be learning, using state and national standards as a starting point for identifying local priorities. Schools should pinpoint the content knowledge and skills that are appropriate, with an eye toward providing continuity and eliminating overlap. (See Chapter 4 for information on standards and benchmarks.)

All stakeholders (including students) should be clear as to: What should students be learning? What level of proficiency is expected? How will we know if students have learned the essential knowledge and skills?

3. Identify available student data to determine what students should be learning.

Most districts already have evidence of student learning, Paynter explained. However, many are not clear how this evidence relates to the standards, nor are they clear as to what the evidence can tell them. For example, many districts have data on graduation rate, drop-out rate, standardized test scores, results of district assessments, results of state assessments, letter grades and self-assessments, but have not clarified how these data relate to what they have said students should be learning. Often they are data rich, yet information poor. Data on student learning should lead the district to identify gaps, strengths and weaknesses and provide overall patterns for areas of concern. Questions to be answered: What is the data telling us? What patterns do we see? What are the areas of concern and improvement?

4. Identify best practices indicated by research, with a special focus on what the present student data is saying.

This step should begin to answer these questions: What can a teacher do to facilitate learning? To what degree is the current system in line with what the research is saying? What do committee members believe about best practice? What effect will a difference in beliefs about current practice and best practice have on the system?

Remember not all research is equal, Paynter cautioned. The committee should check the reliability of the research behind the methods by examining the credentials of the researchers, the connections to established learning theory, the construction and validity of the research model, and the number and duration of replications. (See accompanying table on evaluating innovations in instruction.)

5. Determine the appropriate instructional practices and curricular activities that will support students in learning.

Once committee members have familiarized themselves with the current research, they are ready to identify possible methods that would best support student learning within their district, Paynter explained. A number of different research-based methods are usually available. However, not all methods will work well in the context of all schools. Committee members should examine the most promising methods in light of their own students, the community profile, the readiness and capabilities of their teachers, and the capacities of the school or district. Probing further for a good match, committee members should ask: Can, or should, these methods be integrated into what we are already doing? How do they relate to our vision?

The committee should find out what teachers are already doing and challenge what is not in line with current research. How do their practices need to change? What resources will be necessary (e.g., time, money, human resources)? How will these changes affect other parts of the school or district (e.g., scheduling, use of finances, teacher hiring practices, teacher evaluation)?

6. Determine how to build capacity in teachers.

According to Paynter, once appropriate methods have been identified, committee members need to determine what implementation of those methods involves. Effective leadership sets the expectation that

instruction will be research-based, Paynter said, and then supports the expectation.

A critical factor in adopting new methods is the level of ownership on the part of administrators and teachers. Accountability is not necessarily ownership, and new research-based methods are only as effective as the teachers who take them into their classrooms. Training in new methods must be offered so teachers learn how to use them effectively, and support must be provided in the form of resources and follow-up training. Teachers should be critical sources for identifying learning needs and matching methods to a particular student population. A culture of research and inquiry cultivates those skills.

Staff development programs that address particular instructional methods and rely on research-based interventions produce teachers who know more about learning and how to make it happen. According to Paynter, "If you want to improve student learning, you have to improve teacher learning about learning."

Committee members should look for appropriate staff development opportunities — for example, study groups or online chats —and set up a system to facilitate teachers' access to these professional development opportunities. (See Chapter 3 for more on staff development.)

Many new methods falter relatively quickly, not because the research was faulty or the method inappropriate for a particular

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Evaluating innovations in instruction

To provide guidance on the Comprehensive School Reform Demonstration program, the U.S. Department of Education developed a matrix for evaluating research-based models. The following is an adaptation that can be used to evaluate instructional innovations.

Theory	• The innovation explains the theory behind its design, including references to the scientific literature that show why it improves student achievement.
Evaluation	• Student achievement gains have been shown using experimental and control groups created through large-scale, random assignment or carefully matched comparison groups. • The innovation has produced educationally significant student achievement gains, determined by appropriate assessments conducted both pre- and post-intervention. • Student achievement gains have been sustained for three or more years. • Student achievement gains have been confirmed through independent, third-party evaluation.
Implementation	• The innovation has been fully implemented in multiple sites for more than three years. • Documentation is available that clearly specifies the innovation's implementation requirements and procedures, including staff development, curriculum, instructional methods, materials, assessments and cost. • The costs of full implementation are clearly specified, including whether or not the costs of materials, staff development, additional personnel, etc., are included in the program's purchase price. • The innovation has been implemented in schools with characteristics similar to the target school, including grade levels, size, poverty levels, and student demographics such as racial, ethnic and language minority composition.
Replication	• The innovation has been replicated successfully in a wide range of schools and districts, such as urban, rural and suburban. • The replication sites have been evaluated, demonstrating significant student achievement gains comparable to those achieved in the pilot site(s).

Using research to inform practice in Flandreau, S.D.

Administrators and teachers use research to inform practice in South Dakota's Flandreau School District. Superintendent Mark Froke provides the leadership for grounding the district's vision in research and generating strategic plans, programs and methods based on that vision. He sees to it that teachers have opportunities to gain knowledge and skills, involves them in every stage of planning and implementation, and provides ongoing support, ranging from resources to encouragement. "Our focus," Froke said, "is capacity-building through continuous training and opportunities for learning, which in turn creates learning opportunities for students."

The district has won a number of awards, grants and other forms of recognition for its outstanding and innovative work with students. Most recently, on the recommendation of the state's Department of Education and Cultural Affairs, Flandreau was chosen as the one district in a seven-state area to receive technical assistance in any area it chose. The district arranged for assistance in creating a new training program.

A "modernization" effort

Flandreau's research orientation has its roots in the "modernization" effort funded by the state of South Dakota in the early 1990s. The state selected 20 districts and provided them with funding to create a local team of teachers to revitalize curriculum and learning. The process is now supported by district budget appropriations for both staff development and development of initiatives. A faculty advisory committee determines the focus of staff development, which is often conducted by local teachers. The district also actively seeks state and federal grants for pursuing research-based innovations.

As part of the modernization effort, the district has established a process for

- reviewing research, through staff committees, on what works;
- selecting programs and methods that fit the community and the student population;
- applying research to the continual improvement of instructional strategies;
- focusing on student achievement; and
- relinking that achievement to student success within the community.

The research focus has led to a district emphasis on engaged learning. "We no longer see the teacher as the person who controls learning, but as the person who works with and guides the student in learning," said Superintendent Froke. "The student is the explorer, the producer of knowledge, instead of the passive learner."

Building administrators and teachers also pursue research individually, work with Froke to bring research-based innovations into the classroom, and serve as both leaders in planning efforts and trainers in staff development. Staff development and curriculum planning currently involve more than 80 percent of the district's teachers.

The use of research can be seen in the work of Dawn Olson, principal of Flandreau's middle school. After setting learning goals, she gathers baseline data and then assesses progress from the baseline toward the learning goals. "We can't just rely on intuition," Olson said. "If we're making progress, it should show in good data."

Spafford Elementary principal Trudy Myers continually reads education journals and attends conferences. "I am a strong believer in attending national conferences," she said, "because that's where the ideas start." She consults with teachers and parents to gauge whether methods will work in their community with their students. After selecting promising methods, she focuses on intensive staff training, taking teams to conferences as well as bringing training on-site. She is especially concerned that teachers understand the theory behind the method and fit it to the school and the community.

Janna Ellingson, a high school English teacher, is a leader and trainer within the district for implementing integrated and thematic instruction, a research-based method used in Grades K–12. Thematic and integrated instruction requires

extensive planning and a collaboration process that has generated enthusiasm and engagement on the part of teachers, as well as students. Working in teams, teachers create thematic units that integrate two or more subject areas. As they prepare, they continue to draw on research about how students learn, with an emphasis on making connections and applying knowledge to new situations. Teachers also make as many linkages as possible to the community.

Ellingson's research orientation has given her a greater sense of mastery in the classroom. "Now I have a reason for everything I do," she said. "I have a clear picture of where I'm going and where I want to take the students." Because she explains learning goals at the beginning of every new lesson, her students also see the relevance of what they are doing.

Whether or not districtwide programs have been implemented in certain areas, a number of individual teachers base their teaching approach on engaged learning. Middle school science teacher Kym Johnston rarely lectures or teaches from a textbook. Her students learn abstract scientific concepts and principles through activities and experiments. They discovered the principles of velocity by making accelerometers from baby food jars. "I'm always looking for ways to give them a mental picture," Johnston said. Often she simply gives them the tools and a few instructions, then watches them experiment. "They come up with things I'd never dream of," she remarked.

Technology applications used in the district range from research on the Internet to creating home pages. Using her tech/Web training, third-grade teacher Margo Zephier developed a home page entitled, "Where the Buffalo Roam," which is based on the local Santee Sioux tribe, who raise buffalo. The home page creates links between the community and the classroom through music, lessons in the Lakota language, art activities, and a design that enables users to add other units.

District outcomes are changing

A number of performance measures indicate the Flandreau approach is working. SAT and other norm-referenced test scores are rising. District staff are seeing more excitement, engagement and commitment on the part of students, teachers and parents. Through alternative assessments such as projects and portfolios, students are demonstrating stronger connections to their education. Teachers see students who are better prepared to meet the challenges of each new level of learning.

As district staff enjoy positive results, they also see the need for more clarity and continuity in learning goals, coupled with assessments designed specifically for those goals. According to Superintendent Froke, the district also is aiming for measures other than norm-referenced tests, particularly tools that allow students to learn while they are being assessed. The district is working with McREL to increase use of research-based instructional strategies. The overall goal is to create a cohesive learning community which reflects the vision of the total school community.

The process requires long-term commitment. It also requires the right resources, including state and federal grants, and staff development aimed at both capacity-building and ownership. The moving force is administrative leadership that is informed and continuous. ■

Flandreau, S.D., high school English teacher Janna Ellingson helps junior Paul Tree Top with an American literature assignment. Ellingson has been instrumental in the implementation of integrated and thematic instruction in the district.

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setting, but because schools lose focus, taper off in level of effort, or change methods too quickly. In short, they fail to build capacity in teachers. Committee members should prepare for a long-term commitment.

7. Collect student data and analyze it to see if the new practices are making a difference in student learning.

Plans for implementation must include processes and tools for evaluating the effectiveness of the new method. This involves not only finding or designing appropriate and valid assessments, but also training teachers and administrators how to gather and interpret data. (See Chapter 7 on evaluating school reform.)

Current research indicates that assessments should answer a range of questions, including: Did students understand the content? Were they engaged and excited about it? Did they become independent in their ability to pursue and use the knowledge?

Planning for assessment also means planning for accountability: Who is accountable, to whom, to what extent, how often and in what form?

Additional questions to be answered: Are we collecting good data? (Is it reliable and valid?) Are we making correct (fair and credible) interpretations? What areas are still weak? Are we meeting our learning goals? Where are our strengths? What assumptions are we making?

8. Revise as necessary.

Careful planning and a sound research base will increase the likelihood that new methods will prove effective, but the process of implementation should indicate when and where adjustments need to be made. Administrators and teachers need to be flexible in order to revise methods and processes in view of the data collected. This might involve reviewing the research and holding further conversations among students, parents, teachers and administrators.

Questions to be answered: With what issues are teachers and students still struggling and what additional help is needed? What needs to be adjusted? What new information is needed? What staff development efforts, training efforts, etc., need to be in place? In what way do these efforts need to be changed? (See Chapter 7 for information on evaluation.) ☐

Biographical sketch — Diane Paynter

McREL Senior Associate Diane E. Paynter, an international trainer and researcher, works in the areas of standards development, complex thinking and reasoning, curriculum development, assessment practices and literacy development. As director of McREL's Literacy Initiative, Paynter leads a group of researchers in focusing on early literacy development in young children and provides training in the areas of integrating the language arts, literature-based reading, process writing and vocabulary instruction. She is co-author of *New Approaches to Literacy*, an American Psychological Association publication for mediating the reading and writing process, and *Literacy Plus*, an integrated approach to teaching reading, writing, vocabulary and reasoning. Paynter also co-authored the *Dimensions of Learning Teacher's Manual* and *Trainers' Manual*.

Chapter 3

Invigorating education by reinventing staff development

—by Public Relations Consultant Peggy Gonder, APR

The five third-graders gather around their teacher, each holding a dark blue book. On the book's cover is a Native American girl standing knee-deep in a river. "What do you think is happening?" third-year teacher Kristi Meyer asks her students, all of whom speak English as a second language. Sitting to one side of the reading group is teacher-leader Lisa Toner, taking notes.

"I think the girl is camping and trying to catch crayfish for dinner," a girl volunteers.

"Good," says Meyer approvingly. She directs the group to open the book and asks questions before they read each page, to see how well the students are using context clues from the illustrations as they read.

Toner and Meyer meet the following day in an instructional dialogue session to evaluate the lesson and reflect on what was learned, by both the teacher and the students.

"What was your teaching point?" veteran teacher Toner asks Meyer at their follow-up dialogue.

"I wanted them to learn to use all sources of information — especially pictures — to help them to read," Meyer responds.

The dialogue continues in a friendly and professional manner. Meyer is open to Toner's comments and questions, rather than defensive, because she knows Toner is there to help her grow and improve.

— Chapter 3 at a glance —

Only recently have educators begun to understand how staff development must change to support the successful implementation of school reform. Research and successful practice have demonstrated that in order for staff development programs to be effective, they must be relevant to the organization's vision and mission, supported with adequate resources and supplemented with follow-up sessions.

The U.S. Department of Education has identified a number of criteria for successful staff development programs. This chapter examines nine key factors, along with tips for addressing the challenges of limited time and funding. It presents comments and insights collected in an interview with Therese (Terry) Dozier, special advisor on teaching to the U.S. Secretary of Education.

All teachers at Montview Elementary in Aurora, Colo., participate in weekly coaching sessions such as the one described above. These job-embedded staff development sessions make up one piece of a comprehensive program that earned the school an award from the U.S. Department of Education (USDE) in 1998 as one of eight model professional development programs in the country.

Montview is an unlikely award-winner. Some of its students are highly transient, creating a turnover rate within the student body of 126 percent. Three-fourths of the students are from ethnic minority families. Seventy-seven percent of students qualify for free or reduced-price lunches. Through a five-year school-improvement process, Montview has created a culture where teachers are collaboratively and enthusiastically engaged in increasing their skills as educators — learning at a much deeper level how a child's mind works and polishing instructional strategies to reach those challenging children who can learn only with lots of support and guidance.

Teachers also attend voluntary, weekly staff meetings because they are devoted to instructional improvement rather than business as usual. "I go to the dialogue sessions because I don't want to miss out on the learning," said Meyer. Teachers aren't penalized if they don't go, she added. At Montview, the important thing is "showing growth in your [teaching] practice."

Montview is one of a growing number of schools and districts that has transformed its staff development to support a comprehensive approach to school improvement. Common elements include a focus on student needs and programs that are collaboratively planned and embedded in the daily life of the school. Professional development is evaluated in terms of its impact on student achievement and other measurable criteria.

Out with the old

Across the country, schools and districts are finding that old models of staff development

are not working. The National Commission on Teaching and America's Future in its report, *Doing What Matters Most: Investing in Quality Teaching* (1997), found that, in most districts, "professional development investments are fairly paltry," with most districts offering "hit and run workshops that do not help teachers learn the sophisticated teaching strategies they need to address very challenging learning goals with very diverse populations of students."

District staff development dollars, moreover, are not directed "in a coherent way toward sustained, practically useful learning opportunities for teachers." The Commission also found that nearly one-fourth of newly-hired teachers lacked qualifications for the subject matter they were teaching. Perhaps most disturbing is the toll on new teachers. Data from the National Center for Education Statistics show that 22 percent of all new teachers leave the profession in the first three years, due to lack of support in dealing with the problems they encounter in the classroom.

... 22 percent of all new teachers leave the profession in the first three years.

The Commission's recommendations covered the continuum of teacher preparation, from college courses to professional development training in school districts:

- Link standards for teachers to standards for students.
- Reinvent teacher preparation and professional development.
- Overhaul teacher recruitment to place qualified teachers in every classroom.
- Encourage and reward knowledge and skill.
- Create schools that are organized for student and teacher success.

Criteria for success

The good news is that research and successful schools have demonstrated the essential elements that must be in place for staff development to truly have an impact in the classroom. In 1997, the U.S. Department of Education identified a set of criteria for high quality professional development:

1. Focus on teachers

Effective staff development focuses on teachers as central to student learning in classrooms, yet includes all other members of the school community. At Montview Elementary, weekly dialogue sessions and coaching from teacher-leaders are available to music, art and physical education teachers, as well as regular classroom teachers. In addition, a coordinator from The Learning Network (see bibliography) visits the school monthly to provide support and training to teacher-leaders and the principal, guiding staff through changes in teaching practice.

Involving parents in the "school community" is important for at least two reasons, Dozier said. Such involvement builds understanding among parents about the need for staff development, which they might otherwise see as taking time away from educating their children. If they are included from the beginning, parents can become educational partners who can reinforce skills taught in the classroom.

2. Include individual, group and organization improvement

Staff development does not occur in isolation. Instead, it is tied to schoolwide or districtwide efforts to improve student achievement. Montview began its journey

five years ago because the student population was changing. Students were more transient and increasing numbers did not speak English. Among the norms collaboratively developed was a belief that "good initial instruction is better than a remedial approach," explained principal Deborah Backus. "We decided our classroom teachers were going to become experts in learning. If you understand how a first language is learned, you are in a better position to teach English as a Second Language or Limited English Proficient students."

The school explored several approaches and settled on the research-based Literacy Learning Model developed in New Zealand where, "children's needs, as assessed by the teacher, determine what is taught," Backus explained. The teacher listens to a child read and keeps a running record, noting the kinds of errors made to determine the next small skill the child needs to learn.

"When you take away teachers' manuals, what do you give them?" Backus queried: "Staff development." All teachers attend a four-day summer institute, "Literacy Learning in the Classroom," run by The Learning Network, to receive a grounding in the teaching-learning cycle and to learn how to diagnose student errors and plan instruction. Teachers hone their individual skills through weekly, one-on-one coaching. They improve as a group by discussing topics of common concern at weekly staff dialogue sessions. The schoolwide discussions contribute to shared norms for staff improvement and goals for student achievement.

The staff's efforts are paying off in improved student performance. Montview students' test scores on the Riverside Integrated Language Arts Assessment demonstrated a dramatic improvement between 1995 (the year Montview implemented the Literacy Learning Model) and 1997, with average scores rising from the 73rd to 92nd percentile for the school's general population.

3. Plan collaboratively for the long term, aligning with school and district strategic plans

For professional development to be meaningful, the participants must have an active role in its design. Districts generally establish an overall goal, such as improving writing skills, then let individual schools determine the way they will implement programs to meet those goals. The Lawrence, Kan., Public Schools — another USDE model program winner — established a districtwide focus on improving math and writing skills. Individual school councils review student assessment data and proficiency tests to determine areas of strength and weakness. Then, each school sets specific targets for improved student achievement.

Next, each teacher develops an action plan. Student progress is monitored by videotaping students and reviewing journals and portfolios. Staff development activities include study groups, peer coaching and a staff development resource center, along with weekly early-release days allowing teachers time to attend professional development programs. The district monitors the appropriateness of staff development by

Criteria for high-quality professional development

1. Focus on teachers.
2. Include individual, group and organization improvement.
3. Plan collaboratively for the long term, aligning with school and district strategic plans.
4. Nurture intellectual and leadership capacity of teachers, principals and others.
5. Promote continuous improvement, embedded in daily life.
6. Use the best available research and practice.
7. Increase expertise in subject content, teaching strategies and use of technologies.
8. Invest substantial time and other resources.
9. Evaluate for teacher effectiveness and student learning.

awarding continuing education credit only when the applicant can provide evidence that the activities lead to actual changes of teacher behavior in the classroom.

4. Nurture intellectual and leadership capacity of teachers, principals and others

One of Montview's goals was for teachers to develop new understandings about how children learn. "Teaching is probably the most complex task there is, according to brain research," Backus commented. "We don't want teachers to go in and mimic another teacher's practices, but to be able to analyze what is occurring in the classroom and what needs each child has."

"All of the [USDE staff development program] winners have principals who see themselves as instructional leaders," said Dozier. Principals need group facilitation skills, among other skills not traditionally listed in their job descriptions. "Schools should actively recruit new principals with the right skills, rather than wait for them to self-select," she added. Dozier recommended recruiting "strong teachers who understand how to work with adults."

5. Promote continuous improvement, embedded in daily life

Trying new skills can be threatening to teachers. A good idea may not always translate successfully on the first try. The old method of staff development, where teachers attended a one-shot workshop and were expected to implement with little follow-up, has not been proven to be very effective. Once problems arise, it is human nature to retreat to the known and predictable ways of teaching, especially if the culture of the school is to punish failure rather than to encourage risk-taking. Instead, what is needed is a change in the school's underlying culture, along with ongoing support to teachers as they try new instructional materials and strategies.

Montview Elementary Aide Kathleen Connelly (right) helps an enthusiastic Robert Holland (center) with a computer word game, while Monte Valenzuela follows along on a second computer.

The body of research that has developed over the past 15 years requires educators to continue to learn and apply new insights concerning instruction, learning and leadership. According to *Standards for Staff Development, High School Edition* (1995), a study guide produced by the National Staff Development Council in cooperation with the National Association of Secondary School Principals, "The norm of continuous improvement is a belief that learning about one's work is never finished — professional development is dynamic."

6. Use the best available research and practice

The burgeoning research has provided a wealth of information to educators regarding: 1) the nature of the change process, 2) how children and adults learn best, and 3) effective teaching strategies.

With a variety of programs and strategies available, schools need time to explore which professional development approach provides the "best fit" for a particular student population and faculty, while still offering a variety of formats. Examples include action research, where participants identify promising practices, and study groups, where individual teachers can increase their knowledge and understanding of the learning process and new teaching techniques.

When implementing an innovation, the organization needs to study the change process itself, according to *Standards for Staff Development, High School Edition*. The change process has three phases: initiation, implementation and institutionalization. The authors

recommended providing a framework for integrating innovations and relating them to the mission of the organization. Ongoing evaluation should focus on all levels of the organization, to ensure that the innovation stays on track. (See Chapter 7 for information on evaluating school reform.)

7. Increase expertise in subject content, teaching strategies and use of technologies

According to Dozier, research shows that training in how to teach content is more effective than training in a generic strategy, such as cooperative learning. In addition, the new emphasis on national, state and local curriculum standards requires that teachers have a deeper knowledge of the subjects they teach. Higher standards place increasing demands on teachers to increase their diagnostic skills and to increase their expertise in teaching strategies and use of technologies to meet the needs of all students, including those at risk.

8. Invest substantial time and other resources

Studies on improving education and surveys of teachers reveal a common thread — teachers need substantial, uninterrupted blocks of time to learn new skills and craft schoolwide strategies to increase student achievement. A report by the National Foundation for the Improvement of Education, *Teachers Take Charge of Their Learning* (1996), cites a RAND Corporation study which found that learning "new teaching strategies can require as much as 50 hours of instruction, practice and coaching before teachers become comfortable with them."

Reorganizing the school day can provide time for staff development at no additional cost. Dozier said her best training as a new teacher was a common planning period in the middle school where she worked. "That was my professional development," Dozier commented. "I was being mentored by experienced teachers as we worked collaboratively as a team, dealing with problem students and planning interdisciplinary activities. The other teachers also learned from me as we tried new techniques and evaluated what worked and what didn't."

9. Evaluate for teacher effectiveness and student learning

"The staff development principles [developed by USDE] begin and end with students," noted Dozier. Schools must know student strengths and weaknesses before they set goals. As a program is implemented, schools need ongoing assessment, "to identify problems and monitor the intervention, including the training teachers are receiving, to see if the school is on the right track," Dozier added.

The National Staff Development Council recommends three criteria for evaluating effectiveness: 1) student learning continually improves (according to standardized tests, portfolios of student work and teacher-made assessments), 2) principals and other observers report improvements in instructional practices, and 3) teachers say staff development makes a difference for them and their students.

Recruiting and training new principals

In this new era of education standards, schools need principals "who are willing to bend the rules — think outside of the box — about what's best for kids," said Terry Dozier, special advisor on teaching to U.S. Secretary of Education Richard Riley. Dozier said districts need to aggressively identify individuals to groom as future principals.

She recommended that districts:

1) Look for instructional leaders who have good people skills with adults.
2) Give candidates opportunities for (short-term) leadership roles on projects.
3) Provide mentors and internships to build candidates' skills.

"The assistant principalship is probably the worst internship because [people in that position] are usually assigned to handle discipline," Dozier said. In contrast, the assistant principal at award-winning Montview Elementary in Aurora, Colo., shares responsibility with the principal for developing teachers' instructional competence.

Montview Elementary teacher Kristi Meyer (adult on left) teaches third-graders Alonzo Abeyta (left) and Carlos Gonzalez, while teacher-leader Lisa Toner observes.

Orienting new teachers

The most endangered species in American education is the beginning teacher. Fresh from college with perhaps one semester of student teaching, many young teachers are given the teaching assignments no one else wants — classes filled with students who are discipline problems in challenging schools. To make matters worse, they receive little support to help them develop the classroom management and/or instructional strategies they need to be successful with their students.

Under these conditions, it is not surprising so many leave during their first years of teaching. Mentoring programs that pair a teacher with a more seasoned colleague and induction programs that give teachers opportunities for coaching and feedback can do much to reduce the isolation and frustration felt by beginning teachers.

At Montview, the Literacy Network's four-day summer institute-and weekly coaching sessions provide the support that new teachers need. "I felt so good after attending the institute," said Meyer. "I was so turned on to my own learning." The weekly coaching sessions "sometimes took me out of my comfort zone" during her first year of teaching, "but it was enlightening. I feel the spark would have been snuffed out without the support I have here."

Conquering challenges

Finding time —

Teachers need time each week to work on improving their professional practice. Some schools have found time by reorganizing the school day. Districts allow schools to schedule early- and late-release days so blocks of time are freed up for collaborative planning and problem-solving. The key is to become creative, thinking "outside the box" of traditional schedules.

Funding —

The National Staff Development Council recommended that districts allocate 10 percent of district budgets to professional development and that at least 25 percent of educators' work time be devoted to personal learning and working with colleagues to improve student learning. Many times, schools have money within their budgets that simply needs to be reallocated. Montview Elementary used its Title 1 funds to finance placing two of its teachers half time in the classroom and half time as teacher-leaders. The school also has sought grant funds from the teacher's union and a school district foundation to pay for specific professional development projects.

Public support —

Increasing time and funding for professional development in public schools requires a commitment to communicate with the public about why these changes are necessary.

At Montview, parents are considered partners. "Teaching a child to read entails a heavy practice requirement," noted Backus. "The more we can educate them about the learning process and Montview's instructional program, the more they can reinforce the skills at home."

Getting Started

The nine criteria described previously represent a revolutionary change for districts relying primarily on college courses and individual workshops for staff development credit. As the school and district descriptions illustrate, change does not come overnight, but over several years. It is guided by goals, planning, implementation and evaluation. How then, to begin?

Dozier suggested four actions for school districts:

- *Develop a strong message and vision:* The superintendent and school board, based on data gathered through testing and observation, set goals for increasing student achievement and standards for staff development.

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- *Provide technical assistance and brokering:* Districts assist the change process at the school level by providing skilled professionals to assist schools in planning, identifying resources and obtaining training.
- *Allow flexibility:* Districts leave the specific structure of professional development programs to individual schools, so study and training can be tailored to the individual needs of their student populations and staff members.
- *Insist on accountability:* Schools and districts employ an accountability measure showing the return for their investment in professional development — the effect these efforts have on students and teachers.

In addition to her suggestions for districts, Dozier offered these suggestions for schools:

- *Conduct ongoing assessment:* Schools assess how students are performing on key skills, including literacy and math. It is important to disaggregate the data — to examine the performance of student subgroups, including how males compare to females and how African-Americans, Hispanics and Asians compare to whites. "Composite scores may mask the needs of particular subgroups," Dozier explained.
- *Set goals:* Based on the test scores, schools identify specific areas to address with professional development.
- *Determine how to build in time and collaboration:* The principal and faculty examine what changes can be made to teachers' schedules to facilitate working collaboratively in meeting school goals.
- *Planning for change:* Through study groups or other methods, the school identifies strategies and techniques to use and methods for obtaining the necessary skills and materials to deliver the new instruction.
- *Establish a process to monitor results:* Schools develop tools for monitoring student progress — through observation, portfolios, journals and tests — to determine whether the strategies and materials selected are doing the job in raising achievement in the targeted areas. ■

Biographical sketch—Therese

Therese (Terry) Knecht Dozier is the first-ever special advisor on teaching to a U.S. Secretary of Education. She directs the U.S. Department of Education's teaching initiative, whose goal is to ensure "a talented, dedicated and well-prepared teacher in every classroom." Dozier works to bridge communications between teachers and the department's top policymakers.

Dozier was named National Teacher of the Year in 1985 while teaching world history at Irmo High School in Columbia, S.C. She also has worked as an instructor and college coordinator at the University of South Carolina, taught at the Singapore American School and taught middle school in Miami and Gainesville, Fla.

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OTHER RESOURCES

The Learning Network is a coalition of schools that share a common set of beliefs about how to organize for effective teaching and learning and how to develop skillful teachers and administrators. The network also offers a four-day summer institute, "Literacy Learning in the Classroom," and several publications. For information, call The Learning Network at (800) 262-0787.

To reach the National Commission on Teaching & America's Future: Phone (888) 492-1241; Web site: http://www.tc.columbia.edu/~teachcomm

The United States Department of Education Web site has information on all past Professional Development Award winners (http://www.ed.gov/PressReleases). The main site (http://www.ed.gov/) has a wealth of information on USDE programs and resources.

Chapter Four

Using standards to set clear student goals

—by Education Writer Lyn Chambers

— Chapter 4 at a glance —

The use of standards is one of the critical characteristics of comprehensive school reform. Many experts, such as Robert Marzano of McREL, emphasize the importance of employing measurable goals and benchmarks for assessing student progress. Ideally, those goals will be aligned with challenging state and local content and student performance standards and grade- and age-appropriate benchmarks associated with each standard. This chapter discusses the results of research by Marzano and features Northeast Magnet High School in Wichita, Kan., an example of a school that is moving toward standards-based education with impressive results.

Every Friday, like most American teenagers, students at Northeast Magnet High School in Wichita, Kan., anxiously anticipate the arrival of the weekend.

Unlike most of their peers, however, they also anxiously anticipate the arrival of a weekly report on their academic progress. Yes, report-card anxiety 36 times a year!

At the end of each week, Northeast Magnet sends home with students written, one-page reports on their achievements. The reports provide benchmark assessments of students' progress, using points, percentages and grades, as well as comments and information about upcoming work. Such ongoing feedback ensures that Northeast Magnet students always know where they stand relative to the school's academic goals and standards. So do their parents, who pay a required $10 fee for the reports and know to watch for them every Friday.

The weekly progress report is part of Northeast Magnet's overall commitment to academic standards. This commitment must be working, because students at this school led those at all Wichita area schools in math, science and reading scores. Standardized test results also are well above state and district averages. In addition, 98 percent of the senior class graduated last year, 85 percent of its graduates go on to higher education, and the school maintains a daily attendance rate of 95 percent.

Despite being a school of choice, the composition of Northeast Magnet's student population generally reflects the urban demographics of the rest of Wichita Public Schools. The school's 470 students are evenly split in gender, minorities make up 37 percent of the student body, and almost one-third of students qualify for free or reduced-price meals.

The school's magnet program centers around the areas of science, visual arts and law. Perhaps a more distinguishing characteristic of the school than its magnet program, however, is its lack of sports programs. This, said Principal James McNiece, allows teachers and students to focus on academics. Course offerings are limited to English, mathematics, science, social studies, visual arts, law, Spanish and physical education.

State and district standards play out in almost everything that happens at Northeast Magnet. From the moment students enter the school, their efforts are directed toward academic standards and performance. Curriculum and instruction focus on the skills and knowledge students need to meet district standards. A variety of assessments measure student progress toward meeting standards.

The school communicates the standards and related graduation requirements to students and their parents in several different ways — through meetings, written communications and postings in classrooms. Perhaps most important, frequent reports — such as the weekly report cards — keep students and their parents regularly informed about progress toward established benchmarks.

"Parents love the weekly report," said McNiece. "And the immediate knowledge of results increases motivation for the students."

Standards on the rise

Northeast Magnet's commitment to educational standards is one that, increasingly, is echoed in school districts across the United States. The 1997 Comprehensive School Reform Demonstration program included the use of standards in education as one of the critical characteristics of a qualifying comprehensive reform program. This legislation recognized the importance of assessing student progress through measurable goals and benchmarks that are aligned with state and local content and performance standards.

McREL Senior Director John Kendall and Senior Fellow Robert Marzano affirmed the

need for standards in their book *Content Knowledge: A Compendium of Standards and Benchmarks for K–12 Education, 2nd Edition* (Kendall & Marzano, 1997). They cited two principal reasons for the development of standards: They serve to clarify and raise expectations and provide a common set of expectations.

This chapter draws from the works of Marzano and others, as well as the perspectives and comments Marzano shared in a personal interview.

Defining what students should know and be able to do

What exactly are standards? In the spring 1996 issue of *Improving America's Schools: A Newsletter on Issues in School Reform* (U.S. Department of Education, 1996), standards were divided into two key groups consistent with those defined in the Goals 2000: Educate America Act — academic content standards and performance standards.

Academic content standards describe what every student should know and be able to do in the core academic content areas (e.g., mathematics, science, geography). Content standards should apply equally to students of all races and ethnicities, from all linguistic and cultural backgrounds, both with and without special learning needs.

Performance standards, on the other hand, answer the question, "How good is good enough?" They define how students demonstrate their proficiency in the skills and knowledge framed by states' content standards.

In other words, a content standard defines what students should know and be able to do, and a performance standard defines how they should demonstrate competency.

Student progress in reaching standards is mapped through the use of benchmarks. Benchmarks indicate the levels of performance students should attain at certain intervals. They are "intended as expectations for the upper end of the interval in which they are presented." (Marzano & Kendall, 1996). While benchmarks are generally measured at periodic levels, such as after Grades 4, 8 and 12, they also can be made developmentally appropriate for individual grade levels by "mapping backwards" to expectations for lower levels within benchmark clusters.

Although academic content standards are meant to apply to all students, the strategies for achieving them may differ from state to state, district to district, and even from school to school. So may performance standards and benchmarks. This is important because, "organizing schooling around standards is not a cookie cutter process — no one size fits all. Standards-based approaches must be tailor-made to the specific needs and values of individual schools and districts" (Marzano & Kendall, 1996).

It is especially important to customize the approach applied to students with special abilities or disabilities. To accommodate these students, schools can adjust variables, such as the manner by which a student demonstrates proficiency and the length of time the student has to achieve a minimum level of proficiency. Learning disabled students, for example, may be given more time to meet minimum proficiency levels. Or, as in the state of Kentucky, they may be completely excluded from having to achieve certain performance standards.

Conversely, gifted students may be accommodated by being expected to reach a higher proficiency level of the performance standard. Another solution is to assign them more challenging content.

An historical perspective

Since *A Nation at Risk* was published by the National Commission on Excellence in Education in 1983, American schools have been moving toward educational standards. National policymakers attempted to improve the American education system by setting new policies that eventually evolved into a focus on national goals and standards. National organizations, such as the National Council of Teachers of Mathematics and the National Academy of Sciences, then took up the call to create content standards in their areas, and almost every state has since defined its own version for most core subject areas.

Not everyone in education has jumped on the standards bandwagon, however. Elliot Eisner, professor of education and art at Stanford University and outspoken critic of the standards movement, has repeatedly written that since children develop at different rates and excel in contrasting areas, variance among their performances should be increased, not diminished. "Uniformity in outcome and speed in performance are not necessarily virtues," he wrote in an article entitled "Do American Schools Need Standards?" (1994). Although Eisner

acknowledged that standards may be applied to rudimentary aspects of learning — such as the ability to multiply, write grammatically and spell accurately — he asserted they are not useful in recognizing achievements representing our highest educational aspirations, such as insightful interpretation and development of unique aptitudes.

Through its scathing indictment of the "rising tide of mediocrity" in American public education, *A Nation at Risk* set politics in motion for a sweeping change in the delivery of education. Although not all experts agree this road leads in the right direction, the majority of states are well into the journey.

Moving toward standards

Marzano issued a caution for districts as they begin to adopt standards: "The majority of state documents describe standards at levels of generality that do not provide sufficient clarity for classroom instruction, nor are they precise enough to serve as an instrument of accountability." He recommended that individual districts use national and state standards documents as models for constructing standards that fit the needs of their own students and communities.

Both McREL and the Council for Basic Education (CBE) are currently maintaining databases synthesizing the standards and benchmarks found in dozens of national and state documents, as well as documents from education organizations and schools in other nations. McREL has compiled and synthesized standards and benchmarks from 116 documents into 256 standards, in subjects such as mathematics, science, history, language arts, geography, the arts, civics, economics, foreign language, health, physical education, behavioral studies and life skills. The CBE materials present condensed, edited and commonly-formatted versions of national standards in the arts, civics, foreign languages, geography, history and science. Mathematics and English language arts standards have been drawn from exemplary state documents.

McREL recently commissioned a Gallup survey to solicit public opinion about the importance of particular standards and summarized resulting data in a report, *What Americans Believe Students Should Know: A Survey of U.S. Adults* (Marzano, Kendall, & Cicchinelli, 1998). Respondents rated the importance of standards in the McREL database, indicating which ones they believed were important for students to master prior to high school graduation. While health standards had the highest overall rating and arts standards the lowest, responses to individual standards within subject areas varied widely. Since teaching independently to more than 250 standards requires more instruction time than is available during Grades K–12, the authors suggested further studies to explore the implication of excluding some standards from curricula and integrating others.

Involvement is key to success

Wichita Public Schools began developing districtwide standards in 1992, using the Kansas State Department of Education

standards and goals as a guide. The district convened committees of teachers, administrators, parents, community members and students to craft state goals into specific district standards across the curriculum. They then created assessments to measure benchmarks of student progress toward meeting the standards in the areas of reading, writing and math.

One of the reasons for Northeast Magnet High School's successful move toward standards is its commitment to seeking community involvement and support. Just as the district reached out to the community when deciding the standards, Northeast Magnet reached out to its community for input on its graduation benchmarks and assessments.

"The community is generally supportive of our graduation requirements," noted McNiece, "This is partially due to the fact that they were involved where appropriate in determining the graduation benchmarks."

This kind of involvement is important in gaining community buy-in to the standards process, Marzano explained. He stressed the importance of community involvement at all stages of the development process. He advised first establishing a district-level steering committee to guide the standards-setting effort. This committee, he said, would be responsible for overseeing the development of subject-area standards compiled by teachers specializing in those areas. A major function of the committee would be to ensure a common format and consistent "level of generality" among all of the district standards.

Once the first drafts have been developed, the standards should be presented to a second group that includes community members as well as educators, Marzano advised. The group would be charged with making suggestions for additions, deletions, and changes that would go back to the steering committee and the subject area specialists to be crafted into a second version. This second draft can then be presented to all teachers in the district, or a representative sample, for further review. Information from the review should then be used by the committee and specialists to create yet another draft, this time for public review. This feedback should be incorporated into the final version of the standards and benchmarks.

Students and community members view outstanding student artwork during Northeast Magnet School's Evening of Excellence, a celebration of student work held each spring.

Use a variety of assessments

Marzano recommended establishing a variety of assessments for measuring student progress in meeting standards. These should be designed for use in the classroom, he said, as well as for district or statewide administration. Incorporating assessments into course work may ensure a higher correlation between instruction and the standards. On the other hand, administering systemwide tests at regular intervals helps ensure the reliability and validity of teacher assessments.

Traditional tests, which may include both nationally standardized tests and school-created tests, are usually more easily scored. However, they do not usually require students to apply their knowledge or demonstrate a deep understanding of information. Performance tests, which generally ask students to apply knowledge using real-life scenarios, can take much longer to administer and score. Other types of assessments may include portfolios and informal observation, both of which can be time-consuming and subjective. Nevertheless, used together, these various forms of assessment provide a rounded

picture of student performance. Developing and implementing a variety of tests can be costly, however, and costs must be factored into each school's or district's budgeting process.

Northeast Magnet employs a variety of assessment strategies for evaluating student progress toward achieving district standards. The school's assessments range from school-specific performance tasks to standardized state assessments, such as the Kansas Math, Reading, and Writing assessments, which are given in high school at Grades 10 and 11. In addition, students take the MAT7 (Metropolitan Achievement Test 7), national reading and math tests at Grade 9, and the ACT and SAT college entrance exams. The district also provides its own benchmark assessments in math, reading and writing, staggered among Grades 9, 10 and 11. Northeast Magnet's performance-based tests range from classroom demonstrations to school-specific projects.

All district students are given performance tests in Grades 2, 5, and 8. In the tenth grade, students are tested on the district's performance standards. By administering this assessment during the sophomore year, students who do not pass have time to acquire the necessary skills for meeting the standards before the end of their senior year.

Beginning with the class of 2001, these performance-based tests, along with ongoing student demonstrations and a senior project and portfolio, will form a three-component model for graduation. Although students also will be required to attain course credits, they will not be able to graduate without successfully completing all three graduation requirements.

Marzano supports such performance-based accountability. "The big shift necessary for standards to be effective," he said, "includes holding kids accountable for learning. This means if they don't meet standards by a certain point, they don't go on."

Sensitive to the potential criticisms of such a high-stakes graduation system, the Wichita School District was careful to check its standards tests with assessment professionals and attorneys. The assessment professionals reviewed the tests for validity, while the attorneys looked at the legal ramifications of basing a student's graduation on performance assessments rather than on traditional Carnegie units. Every effort was made to ensure the impartiality and generality of the assessments, as well as their effectiveness in measuring whether students meet district standards. District officials also made sure that parents were involved in the committees that developed the assessments.

"All assessments relate to the district standards," said Assistant Principal David Wessling. "Students know ahead of time what they are expected to accomplish. The criteria are posted on classroom walls, and teachers go over them regularly. We try hard to make the standards clear to students and their parents."

The school's curriculum and instruction are focused on getting students ready to meet graduation standards. "Assessments are, in fact, driving instruction here," said Wessling. "Our tests are integrated into the whole program."

The costs of effective assessment must be factored into each school's or district's budgeting process.

Report cards must be changed

Keeping instruction focused on the end performance goals is critical to the success of the standards movement, said Marzano. A first step in changing the system, therefore, is to change report cards. This holds teachers accountable for ensuring that students can meet performance standards. And, he noted, "once you change the report card, it starts to affect supervision, staff development — everything."

Marzano (1996) wrote that the ideal reporting system would report student progress on each of the standards covered in a course using a rubric that describes levels of performance expected to demonstrate proficiency.

Acknowledging the need to provide a level of comfort to parents during the transition to standards, he suggested that schools also continue to give traditional grades. "This will provide parents with a sense that the system as they knew it is still functioning," he wrote (Marzano, 1996).

Resources pose a challenge

One of the reasons Northeast Magnet has not yet implemented a true standards-based reporting system relates to a common challenge schools face whenever a new system is put in place — availability of resources. Such measures require not only physical resources such as money and people, but the less tangible and ever-important resource of time. When the school's teachers scored student performance

Portion of sample standards-based report card

Standards Ratings

Geography

	Novice (1)	Basic (2)	Proficient (3)	Advanced (4)
Geography Standard 1: Places and Regions		2		
Geography Standard 2: Human Systems			3	
Geography Standard 3: Physical Systems			3	
Geography Standard 4: Uses of Geography		2		
Geography Standard 5: Environment and Society			3	
Geography Standard 6: The World in Spatial Terms		2		
Overall Geography: 2.5				

Reasoning

	Novice (1)	Basic (2)	Proficient (3)	Advanced (4)
Reasoning Standard 1: The Principles of Argument				4
Reasoning Standard 2: Logic and Reasoning			3	
Reasoning Standard 3: Identifying Similarities and Differences			3	
Reasoning Standard 4: Principles of Scientific Inquiry				4
Reasoning Standard 5: Techniques of Problem Solving				4
Reasoning Standard 6: Techniques of Decision Making			3	
Overall Reasoning: 3.0				

Note: From R. J. Marzano and J. S. Kendall. (1996) *A Comprehensive Guide to Designing Standards-Based Districts, Schools, and Classrooms*. Copyright © 1996 by McREL Institute. Reprinted with permission.

tests last spring, for example, it meant giving up over 100 days of teacher time. Each of the school's 25 teachers contributed between three and five classroom days, plus more on their own, to grading the performance tests, which take significantly more time to evaluate than traditional (non-performance) tests.

Accommodating those needs, said Wessling, often requires a shift in resources from instruction to assessment. Another solution is to hire individuals to support the assessment process. Northeast Magnet has a half-time assessment coordinator who assists and works with teachers to implement the assessment program. This person helps keep teachers informed about the assessments and how to use them. Even with only 30 teachers in the school, this can be a daunting responsibility for one person working part time.

Establishing a standards-based culture

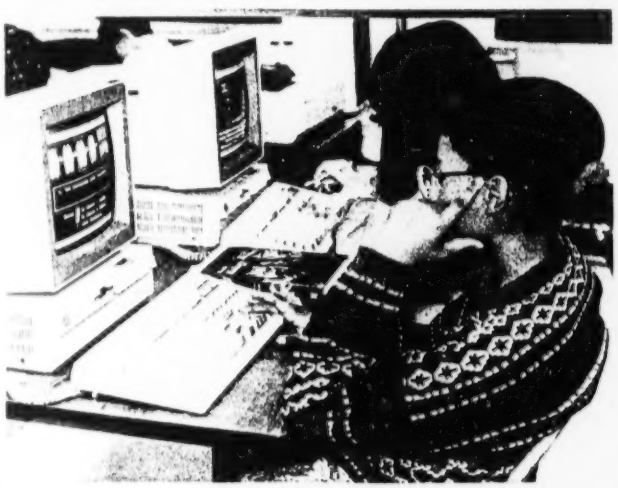
"From the moment teachers are hired to work at Northeast Magnet," said McNiece, "they have a clear understanding that it is a standards-oriented school with high accountability. A lot of conversation takes place in the school about standards, and teachers have many opportunities for support."

Professional development includes training in assessments every August, along with ongoing opportunities for training throughout the school year. Questions and interactions about the standards process are encouraged during department meetings and meetings with the principal. The school provides technological support as well, by equipping teachers with a computer program for keeping track of student progress.

McNiece acknowledged, however, that there is still much work to be done. For example, "We haven't always established a clear relationship between all of our assessments and the standards." But, he said, "improvement is incremental, not an event. I believe in the continuous progress concept."

McNiece ensures accountability for learning by staying tuned in to what is going on in every teacher's classroom. He makes sure he receives a copy of the final examination for every class. Perhaps this focus on accountability is ultimately the secret to Northeast Magnet's success — accountability not only for students, but for faculty as well.

Marzano emphasized the importance of staff accountability, declaring, "Teachers must be willing to give up part of the incredible freedom they have now, and we must make the whole system significantly more rigorous than what it is now." He acknowledged that, for some, such a rigorous system may mean stretching to an uncomfortable level. But such discomfort, he concluded, may be necessary to make standards work. ■



Northeast Magnet School senior Sokha Chen ponders the best graphic display of data for her senior project.

Biographical sketch — Robert J. Marzano

Robert Marzano, a nationally recognized expert on standards, is a senior fellow at the Mid-continent Regional Educational Laboratory. He has written several books on standards-based education, including *Content Knowledge: A Compendium of Standards and Benchmarks for K–12 Education* and *How to Design a Standards-Based District, School, or Classroom*. At McREL, he develops programs and practices for K–12 classrooms that translate cognition research and theory into instructional methods.

Prior to his work with McREL, Marzano was an associate professor at the University of Colorado at Denver and a high school English teacher and department chair. An internationally known trainer in thinking skills and literacy, he has authored 15 books and over 100 articles and chapters on topics ranging from standards-based instruction and assessment to thinking skills and school effectiveness.

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Visionary leadership and support within the school

— by Education Writer Diane McIntyre Wilber

"Comprehensive school reform is sensible and desirable to most Americans, if we can only capture it," said Dr. Janet Barry, superintendent of Issaquah, Wash., School District No. 411. "But schooling in today's society is such a complex effort. If we're ever going to do it well for everyone, we need a navigational star — a strong, simple vision."

Barry's career has spanned 30 years in public school classrooms and administration. In 1996 she was named National Superintendent of the Year. When she came to Issaquah in 1997, the district was growing rapidly, stretching to serve the booming, high-tech suburbs east of Seattle. Despite overcrowding, Issaquah students have a reputation for high academic achievement, and many of the district's teachers and schools have won state and national awards.

According to Superintendent Barry, district personnel will internalize and fully support a district's vision only if the vision is developed from a sense of purpose shared by all the players. "We don't impose the vision," she explained. "We grow it. If the vision isn't phony but truly states our business, then it has the power of magnetic north on the life of the organization. In ever more meaningful ways, it guides our behavior."

Barry's beliefs about shared purpose are supported by the work of author Peter Senge, an early pioneer in the application of organizational learning. In *The Fifth Discipline Fieldbook: Strategies and Tools for Building a Learning Organization* (1994), he wrote that an organization's vision must be shared among people within it in order to build a sense of commitment in the group and to develop the disciplines and guiding practices necessary to work toward the vision. He warned against vision coming from the top down, reminding leaders not to assume that their personal vision is shared throughout the organization.

How does an organization go about growing a shared vision? Ideally, each individual's fundamental purpose for being in education will contribute toward the vision's development and refinement. Senge suggested focusing on building shared meaning, which he defined as "the collective sense of what is important and why."

For any school district, Barry said, the vision has to put student learning at the center of everything. If the vision is to have a real effect on the daily life of the district, she added, the vision process must be compatible with the culture of the organization. "If it's not, the vision is doomed before it's born," she warned.

— Chapter 5 at a glance —

A crucial component of successful school reform is strong leadership by administrators who work with all district personnel to develop and focus on a shared sense of purpose. From that shared sense of purpose, this districtwide team develops a clearly articulated vision for the future which is compatible with the district's culture. The team sets forth its intentions in a simple, yet strong, mission statement.

Combining both top-down and bottom-up management strategies, good leaders develop a shared vision and use it to guide district decisions. Meanwhile, district personnel at all levels provide support within the school by using the vision to guide their own decisions and practice. A vision which is shared at all levels in this way can often survive, and even benefit from, leadership changes.

Making day-to-day progress toward the vision requires open communication, hard work and determination. It also requires continual assessment to inform staff members about their progress. Assessment should include evaluation of any changes in culture which might require adjustments in vision and mission.

Keep it simple

A district's mission statement should be a natural expression of the vision of staff members working from a shared sense of purpose, Barry declared. "The mission statement has to develop from why we believe we're here. It can't be a political statement but rather the moral foundation for the jobs we do."

Unfortunately, many districts' mission statements are too complex for stakeholders to internalize or are treated only superficially. "You can have a fine and lofty mission statement embossed on your letterhead but too often it fails to touch the soul of the organization," Barry said.

Issaquah's process for developing a mission statement wasn't lengthy or formal. Barry described the four-word statement — "all students learning well" — as an almost intuitive agreement among her district's staff, students, parents and community. "A mission statement should strip away the clutter to get down to the core of what has to happen," she said.

Day-to-day progress toward the vision

Implementing comprehensive school reform can be a daunting challenge. However, if a shared sense of purpose is pervasive within schools, across the district and throughout the community, that vision will help guide day-to-day operations and decisionmaking which reflect staff support within the school.

Barry described examples of Issaquah's vision and mission statement emerging within the work of a variety of stakeholders:

- Issaquah bus drivers attending a workshop discussed the most important ways they could support "all students learning well."
- A community-based committee studying alternatives to construction expressed viable options as those that would contribute to the mission.
- Issaquah principals based their schools' continuous improvement plans on data demonstrating how their schools were supporting "all students learning well."

Ideally, the district's vision should emerge in every classroom and guide all aspects of schooling, including decisions about curriculum, instruction, assessment, staff development and scheduling. "Because the vision resonates truth, it appears spontaneously," Barry said.

She cited Issaquah's recent budget process in which approximately 100 staff and community members worked to align budget priorities with the mission statement. As a result of the process, approximately $200,000 was reallocated from noninstructional priorities, such as indirect support categories, to direct teaching and learning priorities, such as new funding for classroom technology specialists.

Moving toward the vision is not easy, Barry admitted. It requires open communication, intelligence and hard work. She contended that educators can easily get off track unless they stay focused on the vision and let it guide everything they do. "As leaders, we point to the vision when we make decisions and others learn to do the same," she said. "It's like the predictable result of pausing in a crowd to look up: three or four others will look up to see what you see."

Leadership styles and strategies

According to Barry, leadership and decisionmaking can't come solely from the top down. "Our job as superintendents is to reframe conversations to model the vision," Barry said. "We must watch; always, always listen; then let it happen."

Lee Bolman and Terrence Deal, in their book *Reframing Organizations: Artistry, Choice and Leadership* (1991), presented a similar view, prescribing strong leadership as a key to realizing vision, but discouraging the use of a traditional, hierarchical leadership style. The authors, who have written several works on leadership and organization theory, promoted what they term "multiframe thinking," wherein leaders "intuitively recognize the multiple dimensions of social organizations and move flexibly to implement vision."

They described four modes of leadership — structural, political, human resource and symbolic — contending that each leadership style can be powerful, but each alone is incomplete.

> Structural leaders can become great social architects who build an analysis of an organization's environment and its capacities into a powerful structure and strategy. Human resource leaders can become catalysts who lead through caring, support, accessibility, and empowerment. Effective political leaders are advocates who are clear about their agendas and sensitive to political reality and who build the alliances that they need to move their organization forward. Symbolic leaders are artists, poets, or prophets who use symbols and stories to communicate a vision that builds faith and loyalty among an organization's employees and other stakeholders (pp. 444-445).

The authors suggested that a leader needs to understand his or her own style and its limits, then integrate it with multiple modes for a more comprehensive and powerful approach:

> What can be fatal for leaders is the inability to acknowledge their own limits and to include in their organization people who possess complementary strengths. Wise leaders understand their own strengths, work to expand them, and build teams that together can provide leadership in all four modes. (p. 445)

Michael Fullan, an expert in the process of change in education, also advocated drawing on the strengths of everyone in an organization in his book, *Change Forces: Probing the Depths of Educational Reform* (1993). He argued that every person in an organization must be viewed as an agent of change, since no one person can understand all the complexities of change in dynamic systems and new paradigms cannot be established by leaders alone.

Indeed, many districts today operate with leadership teams, often comprised of central office staff, principals and teacher leaders. Some even include parents, business leaders and other community members. Despite this move toward team leadership, however, many authorities on visionary leadership argue against either a totally centralized, or totally decentralized, approach. Fullan advocated maintaining a balance between the two extremes, writing that centralization can foster over-control while decentralization can lead to chaos.

Different leader, same vision

All too often, changes in leadership can bring on changing priorities, new reform efforts and a blurring of the vision. But Barry believes if a district's vision is supported across the community, a change in superintendent or other key leaders does not have to mean an end to the vision. "New superintendents can turn the effort so it's barely recognizable," she said, "or they can carry it forward with minor changes."

Sometimes new superintendents can even spark a district to get back on track with its vision. "Different leadership styles are right for an organization at different times, even if the vision stays the same," she said. "Remember, style changes are not vision changes."

Still, Barry cautioned against too frequent changes in the superintendency, recommending that superintendents have a minimum of five years to make significant headway toward the vision.

Assessing progress

Barry prescribed continual, ongoing assessment to determine whether a district is progressing toward its goals. At Issaquah, personnel at individual schools have begun collecting data to assess their schools' needs. The district also is a leader in the state's reform assessment efforts.

Barry also suggested periodic evaluations to determine whether a district's vision remains compatible with its culture, adding that vision is not immovable but should continually evolve. She said staff members at

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Integrated leadership: a success story in rural Nebraska

Shared sense of purpose … teacher leaders … shared decisionmaking — these are not just buzzwords for the Orchard, Nebr., Public Schools. The phrases actually describe the way the district does business.

Orchard is an unlikely example of success. Its enrollment, now down to approximately 250 students, is projected to decline another 20 percent in four years. A stagnant business climate has led to a series of budget cuts. For financial survival, the tiny district is facing unification with two neighboring districts in June 1999. Each district will probably keep its own schools and teaching staff but will likely share an administration and governing board. District leaders hope such changes will help them continue to do a good job on a daily basis for their students. But concerns prevail.

A comprehensive approach

Commitment and pride predominate among staff in the Orchard district. For years, the 24 faculty members (counting the high school principal and the superintendent, who also serves as elementary principal) have put in long hours toward comprehensive school reform — even before such efforts were given that name.

During the 1991–92 school year, a team including teachers, principal and superintendent began training in McREL's "A+chieving Excellence" program, along with teams from other districts, through the area's intermediate service agency. An additional Orchard team was trained the following year. A needs analysis revealed areas of concern including time management and curriculum alignment across subject areas.

As a result, the entire faculty developed a mission statement based on members' shared sense of purpose. Since then, Orchard staff members, with input from community members and a student committee, have created a standards-based curriculum. They've written exit standards, course and unit standards, and a curriculum-wide writing rubric. Recently, committees have begun to study test scores and other assessments, including a parent/student survey and an alumni survey. The district continues to align and revise its curriculum, teaching strategies and assessment.

Getting everyone involved

One key to the district's success is integrated leadership. Orchard demonstrates the use of both top-down and bottom-up approaches, while also benefiting from various leadership styles.

All instructional staff members meet once a month to discuss reform issues. The district was one of the first in the state to adopt a late-start calendar, allowing time for staff members to meet for 2½ hours in the morning before classes begin at 10 a.m. Although the late-start approach allows some time to work on school improvement issues, it still doesn't provide all the meeting time required. More hours must be eked out from staff members' personal time.

Teachers value these sessions, despite the hard work and long hours, according to Cathy Cooper, an Orchard English teacher and member of the school improvement team steering committee. "Peers working with peers makes a big difference," she explained. "People have ownership. On a daily basis we can see that we're headed toward our mission."

The school board's approval of the late-start calendar exemplifies its support of comprehensive reform and the time commitment required. "We started early looking at what we can do to make things better for kids," said Gordon Shrader, board president. "That doesn't always mean you have to throw more money at it. We tried a lot of things over the years but found that late-start provides the actual mechanics you need to get things going."

The decisions made by teachers run much deeper than surface operations. For example, in 1995, after having worked on exit standards and course standards, the faculty pinpointed the need for assessment criteria. "I began to see that the students wrote one way for me but not for other classes," Cooper said. As a result, the faculty devised an across-the-curriculum writing rubric.

Orchard's decisionmaking process is not accomplished solely by a bottom-up approach. A three-member administrative team — comprised of the superintendent/elementary principal, the high school principal and the guidance counselor — meets at least weekly. Most of its decisions are made by consensus, yet each member has final say on issues affecting his or her own particular areas of authority.

Superintendent Al Schlueter began this administrative team approach when he first took on that post 18 years ago. With the onset of the McREL training, teacher involvement became extensive. "Everyone wants to feel a part of something," Schlueter said. "You have a better chance of making the correct decision if you have a number of people in on the decision."

Trust and communication

Leadership longevity throughout the district has helped foster trust among staff and from the community, Schlueter said. In addition to Schlueter's long tenure, Shrader has served as board president for 17 years and the average teacher tenure is more than 12 years.

"We all have a right to say what we feel," Schlueter said. "We don't let little things disrupt what's happening or the whole process will stop right there. And there can be no secrets. We must communicate, communicate, communicate."

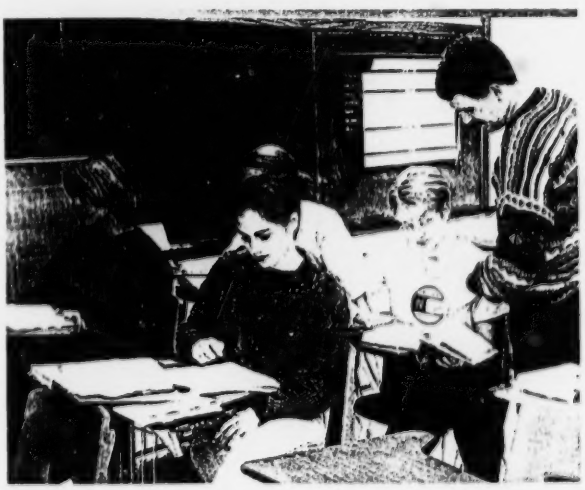
That's not to say that Orchard never faces disagreements, he added. "We run into a lot of walls. When we do, we back up and try a different approach."

Teacher leader Cooper said the team approach brings other advantages as well. "We know more [about] what's going on in other people's classrooms, so we can teach things that enhance them but don't duplicate them," she said.

Cooper and High School Principal Dale Martin cautioned other districts that are attempting integrated leadership and comprehensive reform to not let the time commitment detour their efforts. "You have to have some people willing to be leaders and all staff have to take on added responsibilities besides their own curriculum," Cooper said.

"If people want a quick fix, this isn't it," Martin added. "The time commitment goes on and seems to increase every year."

Nevertheless, staff members agree that the system works for Orchard and is providing their students with a better education. "It's a real exciting time now in education with the teachers involved in school reform," said Shrader. "They're the experts. They know what works and what doesn't."



Orchard trigonometry teacher Dan Schaben (standing) assists students (left to right) Marianna Ricardo, Rebecca Ickes, Sofia Bode (hidden) and Holly Erb.

Continued from Page 29

Issaquah are increasing their consideration of the district's vision and culture in day-to-day assessments. Although her tenure as superintendent of the district is still relatively new, Barry is considering undertaking a formal review process to determine if the district requires renewal or further definition of its vision.

Senge (1990) referred to culture as the set of deep beliefs and assumptions that develop over time in a learning organization. He noted that these beliefs and assumptions can change through experience, thereby changing the organization's culture. Such changes may require adjustments to the group's articulated vision and mission, he explained:

> Visions that are genuinely shared require ongoing conversation where individuals not only feel free to express their dreams, but learn how to listen to each other's dreams. Out of this listening, new insights into what is possible gradually emerge (p. 218). ■

Biographical sketch—Janet Barry

Janet Barry has 30 years' experience in public school classrooms and administration, most recently as superintendent of Issaquah, Wash., School District No. 411, which she joined in 1997. In 1996, she was named National Superintendent of the Year.

Barry earned her bachelor's degree in 1966 and master's degree in 1970, both from Bradley University. She received a doctorate degree in education administration in 1990 from Arizona State University.

Barry is an expert in education reform and systemic change and has lectured on those topics at national conferences throughout the country. Her education philosophy is based on the belief that public schools are both the bedrock of democracy and the hope of individuals in this society. Within that framework, to prepare all children for the emerging world, Barry believes education leaders must act on the belief that all children can learn at higher levels than ever before. She contends that in order for schools to achieve such results they must provide environments where active, collaborative learning is modeled by all adults for students and by students for one another.

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Chapter Six

Bringing the public back to public schools

—by Public Relations Consultant Peggy Gonder, APR

"The public schools are becoming dangerously disconnected from the public. [Because of this deteriorating relationship], the public school system, as we know it, may not survive into the next century."

So wrote David Mathews, president of the Kettering Foundation (1997). His 12 years of research at Kettering led him to conclude that many Americans question the legitimacy of public schools in general — over and above concerns about the effectiveness of a particular school.

The push for charter schools, vouchers and site-based management is evidence that some members of the public no longer see their local public schools as acting in their best interests. Public opposition to innovations such as outcome-based education show that many parents are very interested in their children's education and want to be consulted when decisions are made about overall approaches to schooling.

Polls consistently show that Americans consider education to be vitally important. A 1997 Gallup Poll found that 95 percent of those questioned thought education should be a high priority for Congress and the president that year (Annenberg Institute for School Reform, 1998).

Despite increased interest in education, however, many Americans are disengaged from public life, often due to multiple demands on their time. Voter turnout is as low as 10 percent in some elections. Although people hold opinions about education issues, they are often unwilling to get involved without a determined effort by the schools to draw them in.

"What we found in the Kettering research is that, in many places, there is no community for the public schools," said David Smith, senior associate at the Annenberg Institute for School Reform. Smith spent two years at Kettering, working with Mathews on public engagement. At Annenberg, he is researching examples of public engagement and developing tools schools can use to demonstrate accountability to their communities.

Since many nonparents are not interested in schools, a broader approach is needed to engage them in discussions and action, Smith advised. He said schools may need to begin by examining a community problem, such the local economy. Using the analogy of canaries alerting miners to poisons in coal mines, Smith declared, "Public schools are the canaries of public life. When communities are weak, that shows up in schools."

— Chapter 6 at a glance —

Recent developments in the area of public engagement provide new tools for building support for schools in the community and involving parents on a more intensive level. The process opens a dialogue focused on the needs of the community, as well as the schools, in which participants representing the schools and multiple community interests examine their connections to each other. It encourages new roles for parents and community members, inviting them to take part in decisionmaking.

In this chapter, David Smith of the Annenberg Institute for School Reform, and other experts describe successful examples of public engagement and provide tips for getting started and overcoming obstacles. The chapter also features the public engagement efforts of Cody High School in Wyoming.

Strengthening communities

In rural Howard, S.D., the population had dwindled from 8,000 to 3,000 and the community was struggling to survive. Randy Parry, director of the Howard schools' Rural Resource Center, convened a series of public conversations on aspects of rural life, including agriculture, local history, community politics and economics. According to *Reasons for Hope, Voices for Change* (Annenberg, 1998), these conversations — conducted in people's homes — "evolved into a community visioning process, through which students, teachers, parents and other community members found ways to develop strategic responses to their community's problems."

The conversations explored the problem of Howard's declining tax base, which threatened funding for fire, safety and other city services. Howard High School students initiated the Community Cash Flow Project, which documented local residents' spending trends in and out of Miner County, where Howard is situated.

The students found if residents increased their in-county spending by 10 percent, that increase would raise local retail sales by $2.4 million a year. When the local media publicized this information, Miner County residents increased their local spending by 27 percent, adding $30,000 to Howard's tax revenue.

Reflecting on the events in Howard, Smith noted that beyond the financial benefits, such conversations change the way students, senior citizens and other members of the community think about each other. "The implied message in the curricula of most rural districts — which focus on cities and urban careers — is that students will have to leave home in order to succeed," he said. "There is very little in the curriculum that supports staying in rural communities. Unwittingly, rural schools and communities are at cross-purposes.

"We don't often talk about the purposes of public schools. In rural America, the purpose is really critical," he continued. In farming communities, children are an important part of the labor force. "People have lost farms. [Retail chain stores have] moved in. Kids no longer have the same value and place in the community.

"The conflict [between students, school and community] over the purpose of public schools was very stark in Howard, but it's also present in other communities," Smith concluded.

How is public engagement different?

As the events in Howard illustrate, public engagement is different from the more conventional approach of community involvement in that it engages people in a more personal or substantial way.

Educators have long known it is important to communicate with parents about what schools are doing — through newsletters, organizations and parent-teacher conferences. School boards hold public hearings on budgets, which are poorly attended because of the technical nature of budget documents. Also, if there has been no ongoing dialogue about programs and overall purposes, such public hearings have little appeal to parents and citizens with many other demands on their time. Members of the larger community often have no compelling reason to attend. They don't see an opportunity for meaningful input or a personal stake for themselves in the outcome.

In contrast, public engagement is distinguished by its effort to involve parents and citizens on a deeper or broader level. The "public conversations" approach draws in a wide segment of the community to discuss the purposes of public schools. More than an esoteric exercise, these conversations can have far-reaching effects on the direction a district takes in its curriculum, graduation requirements — even its overall approach to education. In some cases, engagement can mean that a subset of community members also contributes in significant ways to school operations.

As illustrated by the examples in South Dakota and Wyoming (see Page 36), public engagement can take several different forms. However, important elements that are present when engagement is successful include a search for common ground, a trust-building process and candor.

The Annenberg Institute defined public engagement as, "a purposeful effort, starting in either the school system or the community, to build a collaborative constituency for change and improvement in schools." (Annenberg, 1998).

Getting started

How can school districts move beyond communication to engagement? Smith offered the following tips and cautions.

1. Use language that draws people into the discussion.

"The things schools care about may be expressed differently by members of the community," Smith explained. "School people may ask, 'Are our test scores going up?' But if you ask community members, 'How do you know schools are doing well?' their response may be more like, 'Are the youth making correct change in the store? Are they polite in their encounters with adults?'" Smith explained. "Many times we unwittingly use language that communicates to the community that the issue or problem does not apply to them."

2. Organize and seek coalition partners before selecting an issue.

Attendance at the initial meeting can be increased by partnering with existing groups, such as the Chamber of Commerce, local churches and other organizations with whom nonparents are already affiliated. One umbrella topic that can have broad appeal is how the community can make children more successful.

In many communities, violence is uppermost in people's minds. A conversation can begin with a focus on safety from gun violence, then broaden to other social issues, such as protecting students from drug abuse and promiscuous behavior. Smith recommended materials from the National School Public Relations Association on crisis management and school violence as resources to guide such discussions.

Often, schools ask people to help with the school's agenda, instead of asking communities about their needs, Smith said. Schools need to engage individuals so they see a role for themselves in bringing the goals to reality.

3. Talk about the purposes of public schools in terms that all members of the community can care about.

John Stanford, superintendent of schools in Seattle, spoke at a recent conference, describing his visits to churches, business and community groups. "The message he brings," said Smith, who heard Stanford speak, "is not 'help us fix our schools,' but 'help us raise our children.' Everybody has a role to play in this. It starts with where people are. You talk with people about schools, and their eyes glaze over. Seventy-five percent don't have kids in school. There hasn't been a role [in school improvement] for most people. When we begin the conversation around children [rather than around schools], more people may see a role for themselves and get involved."

4. Frame the conversation to create a dialogue, not a debate.

When a conversation is framed so participants get only two choices, it often turns into a debate. This is particularly true if the two choices are polar opposites, like "Do we want vouchers — yes or no?" Unfortunately, debates have winners and losers, and anybody who feels he or she has "lost" is unlikely to be willing to engage in work on behalf of the "winning" position. On the other hand, when a conversation is framed around different things that people hold valuable, people engage in a dialogue in which they are able to hear each other and understand each other's point of view. This can create the possibility of finding some common ground for action.

In a dialogue, it is important to get people to share their stories, to understand why they feel a certain way. For example, when talking about juvenile violent crime, one person wants to "throw the book" at offenders, another wants to help them. With a little probing, the group learns the first speaker has a family member who was victimized, while the other speaker was a youth from "the wrong side of the tracks" whose life was transformed by a caring adult. "By listening to each other's stories," Smith noted, "neither may change his position, but they can understand each other, not demonize each other."

5. Educate the media on what to expect at a conversation.

Reporters are conditioned to cover meetings in terms of what was decided or who won and who lost. The important

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Getting "engaged" in Cody, Wyo.

Parents and the community are plugged into Cody High School, an 800-pupil school in northwestern Wyoming. Community members formed a Community Advisory Team (CAT), which conducts a number of significant activities in the school, including:

- developing an AP/honors program approved by the school board;
- serving on teams that hire new teachers;
- running the school's hot lunch program, at a profit; and
- administering contracts and logistics for all photography.

The Wyoming State School Accreditation Team recognized the Cody High School Community Advisory Team as "an outstanding example of community involvement in school decisionmaking."

Starting from Square One

When Principal Terry Statton came to Cody in 1991, he found a community alienated from the schools and a high school staff with low self-esteem. He spent the first month with staff defining the mission and developing a strategic plan.

(From left) CAT Chair Margie Johnson and Co-chair Leslie Rose join Darlene Manning and Butch Knapp of Cody High School's Food Services on a mission to check out the food service program at a school in Riverton, Wyo.

Statton developed a parent group with committees tied to the school's goals. Attendance was spotty at first, and participants became frustrated by the small numbers involved. The school began engaging the broader community by targeting leaders from segments of the community, including hospitals, law enforcement and business.

"We asked them to come to one meeting a month of the CAT. Square One was evaluating our mission, which was a bonding process," the principal noted. Team members heard about progress on the strategic plan and volunteered to work on committees. "A key decision was not just to do the easy things. Early topics were to move graduation later in May, after school was out, and to look at increasing graduation requirements. We got them into the heart of it.

"That's how meaningful change occurs," Statton concluded. "If you have people involved in meaningful activities, connected to the strategic plan, you increase the quality of involvement and participation."

"Terry Statton believes in [the concept of] TEAM — Together Everyone Accomplishes More," said CAT chair Margie Johnson. "He creates an environment [that communicates] he wants us there. He allows us to do anything we want within our strategic plan. He guides us, helps us and supports us 100 percent."

"This stuff [involvement and power sharing] doesn't come easily," Statton cautioned. "If you go at it halfway, you lose

credibility. The flip side is, you can't just turn them loose. The CAT had to know what our belief systems are." The school's goal, mission statement and strategic plan form the guidelines against which all new initiatives are examined.

Organized for success

Chairs of standing committees on the Community Advisory Team are full participating members of the school's Building Leadership Team (BLT), along with the chairs of teacher committees on climate, curriculum, staff development and technology. Also participating in the BLT are the president and vice president of the student council. "The quality of our organization is now directly dependent on our collaboration between the school and the CAT," said Statton.

The CAT's enormous importance to the school's success can be seen in day-to-day activities:

- When the school board faced eliminating the hot lunch program in August, 1997, following the loss of $27,000 the previous year, the board asked the CAT for help. An eight-member Cody High School Lunch Bunch formed and sought bids from local restaurants. When a new lunch program was initiated, with the Lunch Bunch providing volunteer supervision and assistance, the number of students staying on campus for lunch rose from 25 a day to between 65 and 120 a day. The school charged the restaurants a 10 percent commission for use of school space, which generated $3,000. A portion of that money was used to purchase library materials and the remaining $2,000 is targeted for cafeteria improvements.
- New school staff members are selected by a seven-person hiring team which includes two students, two teachers, two CAT members and one administrator — either the principal or his assistant.
- One of the 80-member CAT's biggest priorities is communicating with parents. The *Parent Paper*, published entirely by team volunteers, is distributed every 4½ weeks and mailed with report cards. Content includes important activities, policies, news from teachers and information about upcoming decisions. It also is mailed to 120 community leaders, banks, clergy and local and state officials.
- The CAT initiated a President's Breakfast to open communication and to network with community groups and leaders. Planned by parent/teacher groups from all seven of Cody's schools, the complimentary breakfast features a well-known speaker, in one case Wyoming's Governor Jim Geringer. Invited are leaders of Cody's clubs, civic organizations, banks, and large institutions.
- CAT committees handle school photography, conducting community/school climate surveys, assisting in textbook reviews, developing signage and the student handbook, coordinating tutoring, and sponsoring a Career Day with speakers and a Job Fair where local employers interview candidates for summer jobs. ■

Community Advisory Team member Cathy Sweet serves up pizza to hungry students at Cody High School in Wyoming. The school's lunch program has been operating at a profit since the team began managing it in late 1997.

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element in a community conversation is how people talk about things. "Spend time with the reporter in advance, discussing how this meeting is different and what he or she should listen for," Smith counseled. "The liberals and conservatives may not agree on anything, but there may be profound moments of deliberation, where a participant says, 'I have always believed this, but now I'm not so sure.'

"That's when movement and growth are possible, when people are listening to each other and willing to challenge their own assumptions," Smith noted. "The media in general, and newspapers in particular, can play a powerful role in a community, both by covering dialogue in the community and by being forums for different points of view."

Challenges

According to Wyoming principal Terry Statton (see accompanying story on Cody, Wyo.), public engagement is hard work. It means sharing power and devoting time and energy to efforts not often undertaken by principals or superintendents. Administrators have several concerns:

Loss of control

Many administrators carefully orchestrate how much involvement they allow in their buildings, and the result is relegating the "fluff stuff" to volunteers, said Statton. "Right away, volunteers pick up that it's not worth their meeting time." He advised some self-examination for administrators, who might ask themselves:

- Do I have the ability to allow people to truly get involved?
- What commitments am I willing to make?
- Am I willing to reduce my ability to make changes?

"I have to validate everything I do with other people," Statton noted. One of the benefits is that community volunteers have picked up many tasks that previously sapped valuable staff time. And the quality of decisionmaking improves. "None of us is as good as all of us," he said.

Statton recommended that administrators seek training on adopting this new role, particularly training programs and materials written by Tom Peters (1987) and Ken Blanchard (see "other resources" in bibliography).

Encouraging extremists

Another fear is that opening the school doors will invite in members of fringe groups. If that happens, Statton advises listening to the members' concerns and broadening the discussion to a larger context — what is good for all kids? "They either integrate themselves into a healthy involvement, or they will take themselves out of the process if they can't control it," he said. Meanwhile, having parent and community leaders involved strengthens the principal's hand. "If it is only the principal, he or she becomes the focal point," Statton explained.

Learning a different role

"You can't do engagement from the top down," said Smith. Leaders must listen, share power and build consensus. "Being open to different voices is critical for leaders," he added. What is needed is a facilitator — someone to help the process along, but not dominate, he explained. It is better that this role not be played by the principal or superintendent, because the position can get in the way of the process.

Reluctance of teachers

In the past, teachers have not played a major role in engagement efforts. Some teachers resist increased levels of involvement and decisionmaking by the public, fearing that parents and other lay people will try to impose their ideas on how to teach, what materials to use and other matters which teachers consider their professional turf. To avoid or reduce such concerns, Statton advised beginning engagement with small steps, building trust with the staff and the community.

Getting students involved

Cody High School considers its students to be adults and recognizes the student council as the political voice of the school. Student council leaders attend a leadership camp in the summer, which prepares them to run council meetings and participate on the Building Leadership Team (BLT). When issues involving students arise, they are first referred to the student council. If the student council is unable to devise a solution, the issue comes back to the BLT to develop a rule. "Our basic philosophy," Statton added, "is that no student has the right to interfere with another student's right to learn."

Getting parents involved

Administrators need to be sensitive to demographic and cultural factors that may impede community involvement. "In some Asian and Latin American countries, for example, teachers and school administrators are seen as professionals who should not be

questioned," Smith explained. "Public engagement is not expected or desired. In this country, we have a long history of public engagement in schools, but we need to be aware that not everyone understands or shares that history."

Other adults may have negative feelings about schools because of their experiences as students. These issues must be taken into account when designing a public engagement effort.

Measuring outcomes

Public engagement efforts may not have a dramatic effect on next year's test scores, Smith cautioned. "Still, there can be a snowball effect. Things start to happen. [The effort] can take off in ways you don't expect." Sometimes projects have very concrete outcomes, such as passage of a bond issue or adoption of standards, but the benefits, even of less tangible efforts, may often lie in broadened support for public schools.

Getting the whole community involved

One way to institutionalize the effort is to frame the goal as a communitywide concept, such as developing assets for youth. Researchers at the Search Institute of Minneapolis have developed a list of 40 "developmental assets" for healthy young people. The Institute identifies these assets as important factors in raising young people who are healthy, caring and responsible, with the inner strength to resist self-destructive behavior.

The asset model can be adopted by churches, community groups and individuals throughout the community "so that schools do not have to spend time on nonacademic things," Smith noted. "Asset building doesn't have to be done by organized groups. It can be things in your neighborhood, like baking cookies or playing basketball with the child next door. The key is to give people a chance to think together about what kind of community they want for children to grow up in and about what they can do to make that happen. People need the opportunity to participate in making choices, because they won't act on choices they haven't made."

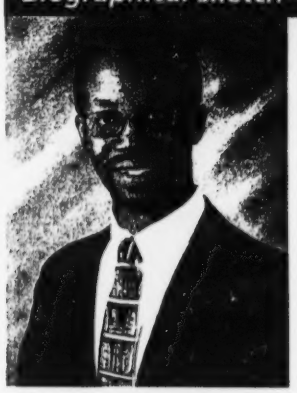
Worth the effort?

Public engagement is hard work. It is time-consuming and can be threatening because it thrusts administrators and teachers into new roles of working with parents and citizens. It means sharing power and consulting with others, which often slows down decisionmaking.

What is equally apparent, however, is that the payoffs can often be well worth the effort. Cody, the lowest-funded school district in Wyoming, has legions of volunteers who provide valuable assistance on work that would otherwise be done by school staff or would not get done at all. In schools and districts that genuinely engage the public, the result can be increased community pride and ownership in the schools. For the schools, the reward can be students and staff who feel energized and renewed by the support and creativity of community members who join with them in a common cause — to strengthen the schools and other resources for children and youth. ■

"People need the opportunity to participate in making choices, because they won't act on choices they haven't made."

Biographical sketch — David A. Smith



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Previously, Smith was a visiting fellow at the Kettering Foundation in Dayton, Ohio, where he served as the program officer responsible for research into the politics of education. The research led to a book written by Kettering president David Mathews, *Is There a Public for the Public Schools?*

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OTHER RESOURCES

Annenberg Institute for School Reform, Brown University, P.O. Box 1985, Providence, RI 02912,(401) 863-7990; http://www.aisr.brown.edu

Ken Blanchard Companies offers materials and workshops on leadership. Contact: Center for Professional Development, The Ken Blanchard Companies, 125 State Place, Escondido, CA 92025; (800) 728-6000

Kettering Foundation, 200 Commons Road, Dayton, OH 45459; (800) 221-3657; http://www.kettering.org

National School Public Relations Association, 15948 Derwood Rd., Rockville, MD 20855; (301) 519-0496; http://www.nspra.org

Search Institute, 700 S. Third Street, Minneapolis, MN 55415-1138; (800) 888-7828; http://www.search-institute.org

Chapter Se

Evaluating comprehensive school reform initiatives

—by McREL Deputy Director Louis F. Cicchinelli, McREL Director of Research and Evaluation Margaret Camarena, with assistance from Education Writer Paula Wenger

— Chapter 7 at a glance —

How will you know if the comprehensive school reform initiative you implement is improving your school and student performance? Considering the substantial investments of time, talent and material required to launch such sweeping change, a thoughtful evaluation component is a must.

Effective evaluations that produce useful information for decisionmakers are not afterthoughts; they are integral to the program planning and implementation processes from the outset. A well-designed evaluation should, at a minimum, provide for measuring progress at appropriate intervals, interpreting data accurately and reporting results to stakeholders in formats that are easy to understand.

This chapter is intended to assist school and district staff members in understanding evaluation of comprehensive school reform. It draws upon the expertise of authors Lou Cicchinelli, McREL deputy director, and Margaret Camarena, McREL director of research and evaluation. In addition, an interview with McREL Senior Research Associate Don Burger about his work with Jefferson County School District in Colorado helps explain a component of evaluation involving the collection of student performance data.

Evaluation is a systematic investigation "finding out whether an organization or program is doing what it was designed to do, and how well it is doing it" (Gray, 1997). This chapter discusses evaluation of a comprehensive school reform initiative. The initiative's components, participants, materials, products, activities and outcomes are all potential "targets" of study.

There are many different, defensible ways to carry out evaluations of targeted improvement or comprehensive reform initiatives. Often a good approach is to select what appears to be best from various methods, rather than adhering to a particular evaluation model. But whatever evaluation strategy a school or district develops, it should embody the following general principles:

- The evaluation findings should produce information that can be used to make program improvements.
- Evaluation should be an integral and ongoing part of the comprehensive school reform program.
- The evaluation design should be flexible and able to be modified to collect different types of data in order to reduce costs or provide evidence of immediate or interim effects.
- The evaluation effort envisioned should be realistic in scope and demands on those collecting data or providing information.
- The evaluation should be as rigorous as possible, given the resources available.
- The evaluation should adhere to widely accepted standards for evaluation, such as the Program Evaluation Standards established by the U.S. Joint Committee on Standards for Educational Evaluation (1994) or the Guiding Principles for Evaluation developed by the American Evaluation Association (Shadish, Newman, Scheirer, & Wye, 1995).
- Key stakeholders should be involved in the planning and implementation of evaluation activities as much as possible.

While formal, objective evaluation techniques can be applied to all improvement efforts — from a single instructional innovation to systemwide reform — school reform efforts are more often informally evaluated based on participants' subjective impressions and perceptions. Although such judgments can be useful and may even be accurate, more often they are based on limited knowledge about the changes implemented and, consequently, are biased.

On the other hand, well-designed evaluations can provide accurate and reliable measures of the effectiveness of the reform and help identify program areas that should be modified. A well-designed evaluation examines both the ongoing process of comprehensive school reform and outcomes linked to specific program components. Thus, it can assist in making decisions about program continuation and guide midcourse corrections.

The current demand for increasing accountability underscores the importance of rigorous evaluation of any comprehensive school reform initiative.

Guidance for Missouri CSRD applicants

The state [Missouri] will contract with an independent evaluator. Components to be evaluated will include the following:

- leadership at the building level;
- support from the district;
- authenticity of implementation;
- effect of professional development;
- quality of parent involvement;
- effect and quality of external support;
- continuing commitment of faculty, staff and administrators;
- effect of comprehensive school reform program on student achievement over the years of implementation.

In addition, the district must design, describe in the application and implement an evaluation of both the process and the results of the comprehensive school reform program implemented in each school included in the application. Staff members in each building must also describe a plan to evaluate the program they are implementing.

Guidance on evaluation

Guidance for designing a comprehensive school reform evaluation can be found from a number of sources: the U.S. Department of Education, state education agencies, districts and comprehensive school reform model developers. Although evaluation designs may integrate suggestions from these sources, at the same time they must meet local needs for information.

The federal Comprehensive School Reform Demonstration program sets forth certain evaluation guidelines, some of which can be helpful in evaluating any comprehensive school reform initiative, whether or not the school or district involved is participating in the federal program. Those federal guidelines include the following:

1. The primary focus of the evaluation is measuring program impact on student academic performance.
2. Student performance measures should be clearly related to intended program outcomes.
3. Performance measures are not limited to student achievement.
4. Program implementation should be assessed.
5. Both the program start-up phase and long-term maintenance of the program should be examined.
6. Stakeholder support, parental participation, continuous staff development and monitoring for performance should be tracked.
7. The nature, extent, source and perceived usefulness of external technical assistance should be assessed.
8. Both quantitative and qualitative data should be used.
9. Student performance measures should be compared with past performance at the same site; or performance at similar sites within the district; or against national, state or local student performance standards.

In many cases, state agencies will impose evaluation requirements on programs they fund. (See sidebar.)

Even if not required by the funding agency, there are other features that should be included in a district or building evaluation design in order for it to be considered technically acceptable. Using multiple measures for all major outcomes, such as student performance, is good practice.

For example, it is a good idea to include local or school-developed assessments, if available, since local tests may be better aligned with local curricula and therefore, more accurately reflect learning gains. Using these additional measures will provide a broader view of the program's impact. Bear in mind that if supplemental indicators of program impact are included in the evaluation, they should be closely linked to the initiative's goals and objectives. Such indicators might include attendance, grade promotion, graduation, suspension and expulsion rates, course-taking patterns and parent involvement.

Also, because local conditions influence program outcomes, contextual factors should be examined in the early stages of implementation. Such factors might include

resource availability, staff development, administrative support and teacher involvement.

While comprehensive school reform evaluations should be tailored to particular program goals, objectives and targeted outcomes, they should all include the same five stages: 1) planning, 2) designing, 3) conducting and reporting the evaluation, and 4) encouraging use of the findings. Although these stages are presented sequentially here, it is important to note they sometimes occur in cycles or simultaneously. Moreover, as the evaluation progresses, schools and districts may need to modify their designs, data collection and analysis.

Planning the evaluation

This initial stage of evaluation planning is often given insufficient attention. Too often evaluators immediately begin to develop the various components of an evaluation design (evaluation questions, measures, methods, analysis, etc.). This temptation must be resisted! It is important to understand the political context of the evaluation first. Contextual factors may affect implementation of the evaluation and how the results are used by key stakeholders. Thus, the objective of this stage of the process is to get the "lay of the land" and set the boundaries for the evaluation. As evaluators plan their evaluations, they should ask the following questions:

- What issues or conditions led to the development of the program?
- Who was involved in the comprehensive school reform program planning and design process?
- What are the comprehensive school reform program characteristics, goals and objectives?
- Who are the key stakeholders and what do they expect from the program?
- What will be accepted as credible evidence of progress and impact by decisionmakers?
- What resources are available to support the evaluation?

To get a good feel for local conditions, draw upon multiple sources of information and stakeholder views. Review the proposal and meet with those directly involved in planning and designing the program to gain a thorough understanding of why the proposal was written, as well as what were the original goals, components and targeted outcomes.

This also is a good time to develop a preliminary list of the major evaluation tasks and time lines; to estimate staff time, expertise and other resources needed; and to compare these estimates with expected available resources. If resources are insufficient, consider re-scoping the evaluation effort or collaborating with nearby schools, districts and universities or educational service agencies to acquire the staff time, expertise and materials needed.

Needs assessment data that may have been collected to guide the design of a reform initiative also can serve as baseline data for measuring progress and program outcomes. The best way to collect this data is to use "focused inquiry," which consists of a series of discussions among key decisionmakers, administrators and teachers. Through focused discussions, local contextual factors can be

identified and factored into the design of the reform strategy. These factors include the history of prior reform efforts, current capacity and the collective thinking that led to the design of the comprehensive school reform program.

Designing the evaluation

Designing the evaluation involves specifying what to examine and how to examine it. There are many things to think about, most of them interrelated. But in general, evaluators should follow these steps:

- specify evaluation questions,
- identify interim and final outcome variables,
- select measures for each variable,
- identify information sources,
- identify the study participants and select a sample, and
- select data-collection methods and instruments.

Evaluation questions should provide focus and be derived from the program goals and objectives. To answer evaluation questions, collect information about program characteristics, processes and outcomes. Key stakeholders (both proponents and opponents) and education experts also may pose questions for the evaluator to address.

It also is important to include both process and outcome questions. *Process questions* usually focus on program planning and implementation processes. *Outcome questions* typically focus on the extent to which program goals are met and expected outcomes realized. A well-designed comprehensive school reform initiative with clearly defined goals, program components and intended outcomes will facilitate the development of evaluation questions that provide useful information to improve the efficiency and effectiveness of the program.

Evaluators should gather both process and outcome data. During the formative evaluation phase, assess the level of implementation in order to determine whether the program was implemented with fidelity to the chosen comprehensive school reform design. Research indicates that failure to achieve desired outcomes is often a result of not fully implementing innovations, rather than selecting ineffective innovations or ones that do not match existing needs. Thus, without determining to what level the reform initiative was implemented, it will be impossible to attribute outcomes to the initiative or to the level of implementation.

The evaluation also should use a variety of measures to assess program implementation, including a review of archival materials (e.g., school reports, program plans and implementation logs, minutes of meetings, student records and assessment data); surveys of, or interviews with, key stakeholders; and classroom observations to monitor changes in instructional practices. In addition to monitoring the start-up phase of implementation, evaluators should monitor the maintenance phase to determine whether positive effects, once achieved, are sustained over time and what program adaptations were necessary.

Once evaluators have determined that the comprehensive school reform initiative has been fully implemented, they can conduct an outcome evaluation to assess the impact

of the program on targeted student performance outcomes. It is advisable for the evaluation to use multiple measures, including student achievement, to examine program impact.

Finally, since support for program implementation often varies across sites, evaluators also may need to compare outcomes of sites that vary in level of resources and support (e.g., technical assistance and professional development) to determine how different levels of support affect program success.

Evaluators also should consider carefully detailing the links between comprehensive school reform program components and targeted outcomes. This will help program developers clarify which components produced the desired outcomes and help the school or district link the process and outcome measures to specific program components. By linking components with outcomes, evaluators will be able to determine in advance whether the comprehensive school reform design incorporates a component or strategy designed to produce the desired outcomes. As a result, components can be added to the comprehensive school reform program to increase the likelihood that it will produce expected outcomes.

Conducting and reporting the evaluation

Timeliness is important in terms of completing major data collection and analysis tasks, as well as reporting the results to key stakeholders. A data-collection plan should specify when data will be collected, who will collect them and how confidentiality and participant consent procedures will be followed. To save time, the evaluator should consider using existing data-collection instruments whenever possible. To ensure consistency of data collection across sites and data collectors, evaluators should consider developing checklists, logs and forms for abstracting needed data from school records and other documents. If staff members with the appropriate expertise are not available in-house, then consultants should be used to oversee instrument development, data collection and data analysis.

Once the hard work of gathering data is done, the really hard work begins. It is time to let those interested in the new program know just what was learned from the evaluation. Effective reporting of the evaluation findings includes the following steps:

- verify audiences and information needs,
- select appropriate reporting media and formats for each audience, and
- deliver/disseminate the findings in a timely manner.

Consider preparing periodic evaluation reports that document the progress of implementation, immediate and interim effects and longer-term outcomes. This process will facilitate providing timely feedback to developers to allow them to make midcourse corrections as implementation proceeds. Providing developers with early opportunities to modify the program will allow them to maximize long-term impact on student outcomes.

Identifying multiple measures

Jefferson County School District in Golden, Colo., worked with Senior Research Associate Don Burger of McREL to create a system for tying classroom-level assessments to state assessments. Burger said the district created a system with four levels of assessments:

- classroom
- schoolwide
- district
- state and national standardized

These levels of assessments provide Jefferson County with a much broader — and hence, more accurate — picture of how its students are performing. Similarly, evaluations that incorporate multiple measures can provide stakeholders with a more complete and richer picture of comprehensive school reform efforts.

Developing interim reports of program results also will allow developers to provide evidence to stakeholders of the benefits of the comprehensive school reform initiative. This will help to generate "buy-in" from any stakeholders who initially did not support the program.

It is important to ensure that the evaluation results are formatted for easy use by stakeholders. The presentation should clearly identify which program components need to be adjusted to attain the expected program outcomes. Also, reporting formats should be developed for linking data to particular issues that concern government agencies, school boards, parents and other stakeholders. For example, principals might receive computer-generated summaries of assessments disaggregated by student groups receiving different types of instruction. On the other hand, school boards or state officials might receive statistical progress reports with charts and graphs comparing student performance data across years or buildings.

Collecting data on student performance

Districts or schools also should consider providing appropriate staff development to build staff members' skills in data collection and analysis. "All too often, schools and districts gather evaluation data without the appropriate methods for analyzing or interpreting the results," said Don Burger of McREL, who worked with the Jefferson County, Colo., School District. When administrators and teachers receive adequate training in data analysis, they usually collect more accurate data and are better able to interpret and use the findings. Involving teachers in collecting and using evaluation data is at the heart of the data-driven student assessment system being developed in Jefferson County. (See sidebar next page.)

Encouraging the use of findings

Reporting the findings does not ensure they will be used by decisionmakers. Some might argue that it is not the evaluators' role to ensure stakeholders use the evaluation findings to guide decisionmaking. Nonetheless, it is advisable for them to be proactive in bringing key findings to the attention of stakeholders by

- following up with key stakeholders to interpret findings and promote their use,
- creating opportunities to discuss findings with administrators,
- assessing stakeholders' understanding of findings and actions taken,
- revising the evaluation plan in response to stakeholders' needs for additional information.

Increasing variability of the evaluation report alone will not produce program changes and improvements — stakeholders and program participants must act upon the results. Consider developing a simple plan for encouraging the use of findings. Over time, a more streamlined comprehensive school reform program design can be developed that includes only those components that have proven to be most effective — i.e., the "active ingredients." By identifying those components, the evaluation

will allow schools and districts to make the best use of their resources.

Summary

Applying the suggestions outlined in this chapter will help to create evaluations that can guide program modification and demonstrate the success of comprehensive school reform initiatives. Because the process of planning, designing and implementing successful evaluations requires special technical expertise, which may or may not be available in a district or building, school administrators and teachers should consult technical materials and seek outside technical assistance if experienced evaluators are not available on staff. Finally, evaluators should be involved in the early planning phase because they can help program developers craft realistic and achievable goals and link them with appropriate, measurable outcomes.

Involving teachers in data collection

- Jefferson County School District is developing a data-driven student assessment system that will require teachers to know more about collecting and using assessment data in the classroom.
- As a first step in providing appropriate staff development, the district worked with the University of Colorado at Denver to design a class that teaches administrators and teachers more about assessment.
- The district also offers incentives to encourage teachers and administrators to pursue further training with the goal of developing expertise within the district for providing ongoing professional development on using data to improve curriculum and instruction.

Educators from Colorado's Jefferson County School District R-1 meet to evaluate the district's reform efforts. (From left) Dianne Siebers, a teacher working with language arts standards; Bonnie Young, a second-grade teacher at Little Elementary; and David Hickey, director of the Compass Montessori Charter School, review components of the Colorado Comprehensive State Assessment Program.

Biographical sketch — Don Burger

Don Burger has 25 years of experience in research and assessment in a variety of settings. As a senior associate at McREL, he works with schools and districts on developing standards-based, data-driven systems and organizational structures which support teachers and students. He assists in the development of assessment systems which result in high and equitable achievement for all children.

Prior to his work with McREL, Burger served as director of research and evaluation at Colorado's Weld County School District No. 6. He has been a faculty member at the University of Northern Colorado and the University of Colorado, Colorado Springs. Burger also worked as chief of research and training at the West Texas Rehabilitation Center in Abilene.

Burger holds a doctorate degree in education from Texas Tech University and a master's degree in experimental psychology from Mankato State University. He has authored several articles dealing with special needs children and assessment.

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Chapter Eight

Innovative approaches to maximizing resources

— By McREL Senior Associates Mike Arnold and Nilda Garcia Simms and Education Writer Diane McIntyre Wilber

— Chapter 8 at a glance —

The strategic use of resources is a critical, but often overlooked, component of comprehensive school reform. Success often requires a systematic restructuring of virtually every aspect of school operations with an eye toward enhancing student learning and improving student achievement.

District personnel can begin the process by identifying and evaluating all existing resources, including local, state and federal funds; staff expertise; staffing patterns; time use and availability; school schedules; and technical assistance resources in the community and state. Keeping a clear focus on the district's vision and mission, educators should then allocate resources where they will have the greatest impact. This may require difficult decisions, such as eliminating programs and practices that do not contribute to student learning.

For success at schoolwide reform, districts will need to maximize instructional resources through innovative scheduling, investments in ongoing professional development and training for new teachers. They will need to seek access to outside support, as needed, capitalizing on increased flexibility in the use of federal and state grants and cultivating support from the community in the form of dollars, expertise and in-kind materials and services.

How do we pay for it? That's the "brick wall" many districts encounter when contemplating comprehensive school reform. Although schools and districts may feel they need more resources to improve student achievement, often a closer examination reveals ways to use existing resources in more effective and efficient ways.

Don Saul, superintendent of Thompson R-2J School District in Loveland and Berthoud, Colo., believes you don't always have to throw more money into reform to accomplish significant results. "The reality of school management and organization today is that you have to be very opportunistic," said Saul. "You do have to cultivate and solicit outside resources, but it's important to recognize that flexibility in the way you use resources is a big part of success."

Of course, district personnel must be realistic about the extent to which existing funding and resources will support a school reform effort. But they also must be prepared to make decisions that are based on student achievement targets.

Saul speaks from years of experience in school finance and reform issues, both at the district and state levels. At Thompson, a rapidly growing district in northeast Colorado, he has been instrumental in implementing major changes. In 1996, the district's three high schools were recognized nationally for their use of leading-edge innovations and commitment to academic excellence. They were designated as New American High Schools, an award that is made to 10 schools nationwide by the U.S. Department of Education and the National Center for Research in Vocational Education. They also were honored with the Seventh Annual *Business Week* award for instructional innovation.

Putting resources where they matter most

In order to coordinate resources effectively, the school community must first get to know itself, including all stakeholders (staff, parents, community members and, when appropriate, students) in the process. Although self-examination is time-consuming, it is necessary to identify and clarify community beliefs, values, expectations, strengths and priorities. A clear vision of what needs improvement to enhance student achievement should guide all efforts.

Determining what is important to the school community will assist in the development of a strategic plan. The plan should detail priorities and outline strategies that will improve student achievement. It should serve as a blueprint for making changes in the district's operations and allocating resources.

"It is essential to have a strategic plan drive all reform efforts while recognizing that there are often diversions, opportunities and setbacks," Saul stressed. "Budget reallocations to suit a plan of action need to be creative. One has to look outside of the normal patterns of spending to capitalize on opportunities as they come up."

Next, district planners must identify available resources. These may include resources related to personnel, such as staff expertise, staffing patterns, time use and availability. They may involve logistics and facilities, such as school schedules and availability of space. Funding sources are another consideration, including local, state and federal funds. And there may be outside resources available, such as funding and/or technical assistance in the community and state.

The final step is to reallocate resources as necessary to align them with the district's goals and objectives. In the traditional approach, resource allocation is done incrementally. Existing programs receive funding priority, revenues are balanced with expenses, and if there are any remaining funds, new programs may be implemented. Conversely, revenue shortfalls result in program reduction or elimination. Hence, the priority is to maintain programs with only minimal program changes when necessary.

Schools undertaking comprehensive school reform must move away from the traditional, incremental approach to one that is more systemic. All available resources should be channeled toward activities that produce student learning.

The Thompson district has been successful at reallocating resources by examining and eliminating programs, policies and practices that were not aligned with the district's reform efforts. To assist in this analysis and gain staff support, planning teams made up of professional staff met for one or two weeks during the summer, each reviewing an issue such as curriculum design, service delivery plans and practices, or the overall district reform effort. Each team developed recommendations that were presented to the district board.

One team's efforts simplified K–5 assessment and eliminated national norm-referenced testing, such as the Iowa Test of Basic Skills. Although administration of the national tests was a long-standing tradition at the district, as it is in many districts, Thompson decided to develop its own reading, writing and mathematics assessments aligned with the district's standards-based approach. The district also is participating in the Colorado statewide assessment system.

Thompson's experiences with the reallocation of resources reflect the practical

Eighth-grader Matt Canard calculates the voltage from a laser in an industrial technology class at Lucile Erwin Middle School in Loveland, Colo.

aspects of recommendations made by school finance experts and researchers. In the book, *Financing Schools for Higher Performance: Strategies for Improving the Use of Educational Resources* (1998), finance expert Allan Odden and education researcher Carolyn Busch presented a variety of strategies. They called for a decentralized education system that extends implementation power to schools via changes in governance, management, organization and finance. Among other recommendations, they suggested focusing on curriculum and instruction, involving teachers and parents in decisionmaking, providing schools with budget control and personnel authority, investing in professional development and developing an accountability system.

Maximizing use of staff expertise

Saul is not alone in his desire to maximize teachers' contributions to reform efforts. In their article, "Rethinking the Allocation of Teaching Resources: Some Lessons from Higher-Performing Schools" (1998), Karen Hawley Miles of Education Resource Management Strategies and Linda Darling-Hammond, now of Stanford University, contend that the most promising, and often the most underexplored, area for resource reallocation is the assignment and use of professional staff.

In their study of five high-performing public schools, Hawley Miles and Darling-Hammond found the schools shared certain approaches to resource allocation. Schools in the study challenged collective bargaining agreements. Most changed the contractually defined teacher workday and re-examined staffing formulas. Flexibility in staffing arrangements is critical for schools wanting to provide more personalized education for students and to create the time teachers need to implement a new vision of schooling, the authors concluded. They cautioned, however, that altering any one practice alone may not free up enough resources to significantly change student or teacher learning.

Staffing practices at the Thompson School District also have changed to reflect the new approach to the school's operation. Staffing allocations are site-based decisions; each school determines how best to use its allotted number of full-time equivalent positions (FTEs). For instance, if a school is allotted 15 FTEs, staff members assess their enrollment patterns and curricular demands, then decide on the best staffing option (with one possible solution being 12 classroom teachers and six part-time support staff).

Harnessing time

Most people struggle with the need for additional hours in each day. The classroom teacher is no exception. In general, time is a rare commodity in any school. Therefore, identifying time for teacher planning, coordination of curriculum, and dialogue regarding practice requires creativity and innovation. Hawley Miles and Darling-Hammond endorse block scheduling to address these critical issues. Their recommendations for creative scheduling are supported by other researchers as a valuable reallocation tool. In their article, "The Power of Innovative Scheduling"

"Teachers' leadership, their entrepreneurial spirit, skills and planning abilities are the fundamental building blocks of instructional improvement."

(1995), education professors Robert Lynn Canady and Michael Rettig listed four benefits of a well-crafted schedule:

1. It results in more effective use of time, space and resources (human and material).
2. It improves instructional climate.
3. It helps solve problems related to the delivery of instruction.
4. It assists in establishing desired programs and instructional practice.

The Thompson School District has implemented block scheduling at all three of its large high schools. Each school's schedule is unique, allowing for site-specific differences. For example, Loveland High School initiated an accelerated schedule with instructional blocks of 90 minutes or more. Thompson Valley High School uses a modified block schedule with four 75-minute periods a day in which subjects vary on alternate days.

Thompson also employs early-release Wednesdays during which students are dismissed 1 ½ hours early, allowing teachers time for professional development or collegial planning. Each month, one Wednesday is designated for independent work.

"Teachers' leadership, their entrepreneurial spirit, skills and planning abilities are the fundamental building blocks of instructional improvement," Saul declared. "Teachers work far too hard and have far too much to do, to dedicate substantial school improvement effort within the traditional limits of available time."

Investing in professional development

Early-release Wednesdays represent just one strategy the Thompson district uses to support collaboration and professional growth. Saul said the district also recognizes the need to reallocate money to support staff development. Some of Thompson's innovative strategies include:

- *In-district Professional Development Center* — The district's conservative budget practices usually result in a small net surplus at the end of each school year. Those funds are earmarked to support staff time dedicated toward achieving the district's instructional goals. For three consecutive summers, the district has used these funds, coupled with federal Goals 2000 grant money, to support its own Professional Development Center. Teachers and other professional staff voluntarily meet for one to two weeks each summer, during which they are paid one-half their average per diem rate. Grouped by grade levels or subject areas, they work on issues such as how to implement standards-based education and align curriculum and instruction.
- *Operating without a professional development director* — The district eliminated the position of professional development director and channeled funds that would have covered salary and benefits for that position into staff professional development. Also, capitalizing on partnerships, Thompson shares some professional development

services with neighboring districts. As a major partner in the Centennial Board of Cooperative Educational Services (BOCES), the district has access to workshops, study groups, individually guided activities and the expertise of an instructional services director and professional development teacher. The BOCES facilitates participants' action research and delivers services to its members from such organizations as McREL and higher education institutions.

- *New teacher preparedness training* — To alleviate district concerns regarding new teacher preparedness, the Thompson district designed and implemented an extensive induction program and follow-up mentoring to assist new teachers. According to Saul, this investment may be as valuable as any other innovation, since it addresses real classroom challenges as no other preservice training does. Those challenges can include classroom management, discipline, organization of instructional practices and dealing with discouraged students or students affected by negative outside influences.

Many experts would support Saul's commitment to investing in the development of local instructional capacity. Odden and Busch (1998) wrote that school improvement is dependent on a qualified and skilled teaching force. The focus, they said, should be on curriculum and instruction, collegial work strategies and decisionmaking. In budget terms, they advocated creating both individual and schoolwide capacity, allocating $50,000 per year for a school of 500 students, or 2–4 percent of each school's budget for professional development.

Using federal dollars creatively

Historically, federal funding has been readily available to states and local districts, although federal guidelines and regulations restricted or prohibited the "intermingling" of federal dollars. Districts that used categorical federal funding to supplement their budgets were required to maintain individual program accountability systems. Federally funded categorical programs could not be integrated, nor could funds be pooled. Thanks to recent legislation, many of these federal initiatives now allow districts to combine funds from various programs to support comprehensive reform. This change reduces the cumbersome tracking of individual funding sources, helps consolidate administrative expenditures and eliminates many of the previous statutory and regulatory requirements (U.S. Department of Education, 1996).

Two of the largest federal grant programs now eligible for use in schoolwide reform are Title I, Part A, and the education flexibility demonstration program (Ed-Flex) of the Goals 2000: Educate America Act. In addition, the School to Work Opportunities Act also waives certain program requirements to allow for comprehensive efforts.

Schools also may combine funds from many other federal education programs, including the following major Elementary and Secondary Education Act programs:

- Migrant Education
- Eisenhower Professional Development
- Safe and Drug-Free Schools and Communities
- Innovative Education Program Strategies
- Bilingual Education

Cultivating community support

Support from the community can yield dollars, expertise or in-kind materials and services. The Thompson district has been successful in obtaining all of those. In 1989, the district incorporated the Thompson Education Foundation, a nonprofit organization providing financial support for

First-graders Hannah Hurd and Justin Rogers measure plant growth in a science class at Monroe Elementary in Loveland, Colo.

programs and activities that are beyond the budgetary capability of the district. A voluntary board of directors solicits and manages contributions from the community.

One stellar success stands out among the foundation's many accomplishments. As a result of cooperative efforts from several entities, the district is opening an observatory housing the world's second largest online telescope directly available to educators. The telescope is being provided through a no-cost, 10-year lease from Telescopes in Education. Money to build the observatory came from the Thompson Education Foundation.

Thompson School District enjoys a long-standing working relationship with the Hewlett Packard Company, which has several divisions located in Colorado. When Saul met with corporate leaders, they emphasized their desire to assure that children of the company's workforce were receiving top quality instruction. In partnership with Hewlett Packard, the teachers' union and district administrators generated a standards-based teacher evaluation system that is now becoming a nationally recognized model.

Saul cautioned that it is vital for educators to match their requests with the interests of outside entities. "You don't just put together a wish list and then go shopping," he explained. Educators must identify needs aligned with their district's vision and mission and match them with the interests of private industries, businesses and foundations. However tempting, districts should not accept outside resources without approval from professional staff.

Obstacles to resource reallocation

Schools attempting to reallocate resources and make major changes in their operations should anticipate obstacles. Change is difficult for everyone, but it becomes a major challenge when established practices and traditions are threatened. Resistance may come from community members who identify with a "traditional" school calendar, individuals who feel their livelihoods may be at stake, or an administration trying to maintain the existing power structure. The local context will dictate the issues and solutions.

Central office administrators may be unwilling to give schools the decision-making power to reallocate resources to support site-specific reform initiatives. District administrators also may have concerns about consistency within the district's instructional program. "We're always striving for the right balance between site-based directions and the district's needs, so it's all one big collaborative effort," Saul said. "We evaluate opportunities so we don't suppress site-based initiatives but have to strive for consistency so we're not creating conflicting programmatic issues or duplicating efforts. Without that coordination, you can lose the opportunity to make the most of successful programs throughout the district."

Staff buy-in and community support are essential to the success of any reform effort. Because school change and the reallocation of resources have a direct effect on personnel, inclusive, ongoing and open communication is essential. Districts must undertake changes in inclusive ways to bring the school staff closer together, rather than pulling it apart. It is important to develop a climate in which stakeholders feel they have a "safe passage" through the change process to improved student learning.

"A climate of common purpose and spirit of cooperation with the community at large is critical to the success of reform," Saul explained. "Without it, not much happens. Change becomes unexpected and is harder to attain."

Collective bargaining agreements may present obstacles, especially when reassigning personnel. Therefore, it is essential to include union personnel early in the reform planning stages. Saul believes that a key to modifying collective bargaining agreements is trust. "It's not about power," he emphasized. "It's about mutual support and direction. There's no way in this day and age that we can pay teachers what they deserve to meet the challenges they face. We have to treat them as professionals, give them the flexibility to get the job done, define the goals together and facilitate their leadership in reaching those goals."

The real bottom line

Comprehensive school reform focuses on reorganizing and changing entire schools rather than on implementing isolated programs. For school leaders, the task is clear: Develop a comprehensive school improvement plan that includes goals and strategies for instruction and align resources to support those activities. Creative budget reallocations and support from outside

sources can positively affect education's true bottom line — improved student achievement.

Since his district began such efforts, Saul said, it has seen student writing scores skyrocket, the graduation rate increase to an all-time high, and a substantial increase in the number of students enrolling in two- and four-year colleges.

"The resources are there if you can be creative and opportunistic," Saul concluded. "You have to nurture a culture where cooperation is deemed to be the norm rather than the exception. If all this has taught us anything, it's that real inclusion in planning and program design is absolutely essential to progress. You can design all the systems you want, but if people don't feel good about them, they're not going to work." ■

Biographical sketch

Don Saul has years of experience in funding equity, student assessment and school reform issues, both at the district and state levels. He is co-chair of the Coalition for a Thorough and Uniform Colorado Public Education System and chairs the Colorado School Finance Project Steering Committee.

In 1987, Saul joined the Thompson R-2J School District in Loveland, Colo., where he is now superintendent. He began his career at Thompson as the executive director of business services and became deputy superintendent in 1989, then superintendent in 1993.

Prior to his work with the Thompson district, Saul worked in the Colorado Department of Education's school finance unit, served as a K–12 principal and taught math, science and elementary education.

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OTHER RESOURCES:

Copies of the relevant statutes, regulations and guidance for grant programs issued by the U.S. Department of Education can be accessed via the Internet at http://ocfo.ed.gov/.

Chap

Aligning the components of comprehensive school reform

— By Education Writer Lyn Chambers

Located on the southern edge of the Denver area, Highlands Ranch, Colo., is part of Douglas County, one of the nation's fastest growing counties, with new schools popping up at the rate of two or three a year. Two-year-old Trailblazer Elementary School, however, betrays no signs of the stress that usually accompanies such growth. The school's entrance is colorfully decorated with posters, plaques, pictures — even a handmade quilt — all clearly proclaiming the school's purpose and goals.

Trailblazer is taking a comprehensive approach to school reform. Its staff members have worked on developing the various components of comprehensive reform discussed in previous chapters and are now focusing on the essential step of aligning those components.

From the moment one enters Trailblazer Elementary School, it is apparent these components are aligned in both planning and practice. Visual cues leave no doubt about the school's purpose. The walls are covered with signs and decor proclaiming the school's four areas of focus — the school as a community, a climate for learning, a curriculum with coherence, and a commitment to character — and classrooms echo these priorities in both appearance and instruction.

According to McREL President and Executive Director Tim Waters, a former school superintendent, aligning the various elements of reform is essential to a comprehensive approach. "In schools that are aligned, people are very clear about the primary core," he said. "There's agreement in purpose and outcome. And the clarity exists at all levels: Teachers are clear about what kids are supposed to learn, students are equally clear, and the parents are clear."

— Chapter 9 at a glance —

In order to take a comprehensive approach to school reform, the various elements of reform described in preceding chapters must be aligned so they all work together. According to McREL President and Executive Director Tim Waters, such alignment contributes to clarity at all levels about the purpose and goals of the school or district. This chapter examines the issue of alignment, drawing from an interview with Waters and the experiences of educators at Trailblazer Elementary School in Highlands Ranch, Colo.

The process of alignment

How does one construct a well-aligned, comprehensive approach to school reform? An examination of the approaches taken by Trailblazer personnel and the procedures recommended by education experts reveals that both advocate several key steps.

First, the community should come to a consensus about and clearly define the core beliefs and organizing principles for the school. The district should ensure that existing and future policies are in alignment with the core beliefs and organizing principles.

Stakeholders should outline the goals and outcomes desired for the students, making sure they align with district and state standards and goals. They should then create an aligned plan on what to teach, how to teach it and how to assess progress.

Resources — finances, personnel, support systems, materials and time — should be allocated to support the plan.

The district should provide for continuous communication and feedback loops about the ongoing progress of the plan.

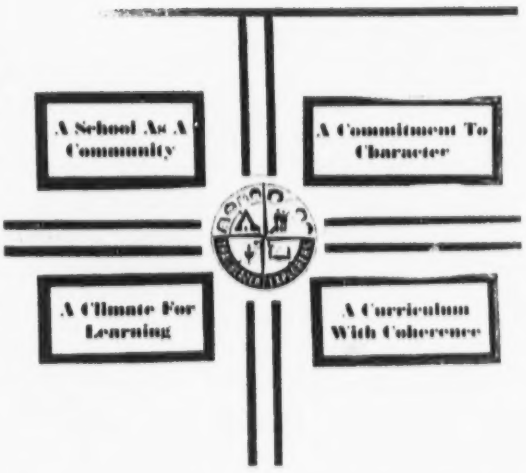
Finally, stakeholders should design a process for evaluating the success of the school reform program.

The alignment process is not necessarily a linear one, cautioned Waters. The steps are interrelated and build upon each other symbiotically. The feedback loops, for example, may turn up information that changes one of the goals. This, in turn, affects the planning process, allocation of resources, etc., for that goal.

Trailblazer's success in aligning the components of comprehensive reform is largely due to a process that has included the above steps. As the new school began to take form, staff and community members spent many hours thinking and talking about the school's guiding values, beliefs, philosophy and mission. This collaboration not only produced, in Waters' words, "shared beliefs about the potential of learners and core values people share about the importance of schooling" — but it also generated broad support for the school's direction.

Each trait defined by the school and community groups was then integrated into one of the school's four focus areas — school as community, a curriculum with coherence, a climate for learning, and a

commitment to character — which were drawn from the work of Ernest Boyer (1995). These were developed into vision statements, ranging from the abstract (defining the need for a "clear and vital mission as a school and as individuals") to the concrete ("Students will consistently bring home a Thursday folder for parents to review and sign").



Trailblazer Elementary's four focus areas are posted throughout the school and in every classroom to remind staff, students and parents about the school's mission.

Policy plays critical role

Waters believes the process of achieving a successfully aligned school begins at the top, with the formation of policy. This refers not only to formal district and school policies, but also to the "mythical" policies, or traditions that are embedded in the system so deeply that they are regarded as policy — such as the "policy" of organizing a school's schedule around the needs of a specific program like music or sports.

Schools, Waters said, must examine their core beliefs, organizing principles and policies to ensure they align with programs, practices and procedures. "Ask yourself, 'Are there policy issues that are getting in the way of what we said we wanted to do?' If you look at the policy manuals of most school districts, you will find many examples of real conflict between what people say they want to do in the name of reform and the policies that obstruct that, including everything from transportation to grading and reporting systems, curriculum and textbook adoption," Waters declared.

An integrated approach is characteristic of well-aligned reform efforts, said Waters. By synchronizing policy and practices with core values and beliefs, reform becomes an integral part of the school. It is not an "add-on" program, but a systemic strategy that permeates all functions of the school.

Armed with a thick notebook called the *Pathfinder Implementation Guide*, Trailblazer Principal Julie Smith demonstrates how the school's guiding values, beliefs, structures, curriculum and environment all reflect the focuses of the school. The guidebook provides the foundation for the major activities of the school, from policy and procedures to instruction and teacher training. Each teacher and member of the school's management council has a copy of the notebook, and much time is devoted to making sure everyone understands its contents.

Selecting research-based instruction

Trailblazer's instructional goals reflect thoughtful examination of current educational research and established programs. "We looked for the best practices," said Smith. "There are many ways to teach reading, for example, but we looked for programs that were consistent, congruent, and collaborative."

A core goal at Trailblazer Elementary is that "students perform well on all measures of assessment and meet or exceed district standards." To accomplish this goal, the school employs research-based instructional practices, such as flexible grouping for literacy and numeracy, and the consistent use of recognized teaching systems and programs. Students also are involved in goal-setting and quarterly learning contracts.

Trailblazer's process for selecting research-based instructional programs and tools involved a careful investigation of successful programs. A school leadership team — consisting of administrators, teachers, the school secretary, the librarian, the staff development coordinator and the special education teacher — previewed materials and conducted site visits on a variety of quality programs to determine those that best fit the needs and goals of their school. "We mainly looked at the programs' success over time with kids," said Smith.

"Their [research] data had to show success for the kinds of students we work with at our school. We kept asking ourselves, 'Is it good for our kids? Is it consistent with our goals? Is it coherent with our curriculum?'"

Staff development supports teachers

Another key factor in assuring the success of schoolwide reform is teacher training. A strong, ongoing professional development program helps teachers develop leadership and management skills that ensure agreement between the school's goals, instruction and assessment. Ideally, said Waters, this training should include programs to enhance core instructional skills, as well as to develop and monitor specific elements of the school design.

Trailblazer staff members participate in weekly staff development through the school's individual academies and grade-level teams, in addition to broader-based standards implementation training. Teachers also receive training related to the various instructional programs and philosophies used at the school. This weekly time together also allows staff members to check the progress and consistency of their classroom efforts.

"Broad change requires time for all members of the organization to work and study together," wrote Bruce Joyce and Emily Calhoun in their article "School Renewal: An Inquiry, Not a Formula" (1995). "Without this collective study time, we cannot move forward as a learning community."

Aligning assessments with state and local standards

Regular, schoolwide assessment tracking procedures are an essential element of assuring a comprehensive approach to reform. At Trailblazer Elementary School, teachers use a broad range of both standardized and informal assessments to determine student growth and mastery. As stated in the *Pathfinder Implementation Guide*, assessment "should not be a product, but a process; not a snapshot, but an album." To this end, the school focuses on ongoing assessment and portfolio development to help determine whether goals are being achieved and students are working toward required district and state proficiencies.

During the 1997–98 school year, Trailblazer focused on two Douglas County Schools content standards: a mathematics standard requiring students to demonstrate an understanding of number sense and the ability to solve problems, and a language arts standard focusing on reading meaningfully. To ensure continuous alignment of the school's assessments with the standards, teachers were required to teach to specific checkpoints throughout the year. In addition, a yearlong time line for standards implementation and reporting was established. This included goal-setting conferences with parents at the beginning of the year, progress reporting throughout the year, and end-of-the-year reports and further goal-setting.

Trailblazer report cards also show how students are progressing toward standards. Although the school issues regular, graded report cards at the end of each trimester, it also sends standards-based reports to parents and district administrators once a year. The "Content Standards Report" shows student progress toward meeting district standards in reading and number sense, and measures the benchmarks students are expected to master at the end of the primary (third grade) and intermediate (sixth grade) levels. Students not proficient in reading at these levels are placed on "Individual Literacy Plans" designed and implemented by teachers, parents and the students themselves.

Strong leadership and support within the school

Effective leadership for school reform relies heavily on strong communication skills, according to Waters. This means listening. Effective leaders of education reform are those who "have a strong vision of their own about what they'd like to see and are willing and able to share that vision, but also are willing to encourage and get excited about others' visions. The most important aspect of shared vision is to find out what visions we have in common," Waters explained.

Administrators at Trailblazer Elementary worked with school and district personnel to develop and focus on a shared vision and mission. The process of involving staff members in the development of the school's guiding values, beliefs, philosophy and mission generated internal support for the school's direction among personnel. Staff members at Trailblazer continue to stay tuned to the school's vision through daily guidance from the *Pathfinder Implementation Guide*. Because teachers are directly involved in the selection of research-based instruction, they also are invested in its use.

Parent and community involvement

Comprehensive school reform often requires a major shift in the way a school does business. Because of this, it is critical that parents and the community support the process. Experience shows the need for a specific, focused and comprehensive public engagement process to ensure that parents and the community

- are aware why improved student performance requires a new education strategy,
- are generally familiar with the core elements of the school reform design and how it aligns with district and state standards, and
- are involved in the selection and monitoring of the reform design.

At Trailblazer Elementary, having an "informed and involved community" is a school goal. Following the spirit of this goal, parents and community members have been involved in the school's goal-setting and implementation process since the school opened in the summer of 1997. Earlier, the district as a whole invited broad community involvement to help determine district focus areas and standards. Ongoing involvement at the site level has been encouraged

Teacher Ann Kennedy and her second-grade students discuss how they will apply Trailblazer Elementary's mission statement to their classroom activities.

"...People can't be expected to implement what they don't understand, and that's what we've asked people to do in the name of reform."

through building accountability councils, site councils, volunteer programs and school-to-career partnerships. A major piece of this process is home visits to each new student's family, as well as goal-setting with parents at the beginning of each school year.

It is critical to the success of reform programs to recognize that community involvement is an ongoing, long-term endeavor, Waters said. "One of the important things to understand is how much time it takes for a community to learn what it has to learn to move forward. You can't push it faster than people are able to learn. People can't be expected to implement what they don't understand, and that's what we've asked people to do in the name of reform."

Evaluation of school reform

Effective evaluations that produce useful information to decisionmakers are integral to the program planning and implementation processes from the outset. A well-designed evaluation should provide for measuring progress at appropriate intervals, interpreting data accurately and reporting results to stakeholders in formats that are easy to understand.

Staff members at Trailblazer Elementary incorporate many of the aspects of evaluation described in Chapter 7 in their daily operations. Periodic assessments help them evaluate how well the school's reform efforts are aligned and functioning. Last spring, school staff worked with Arapahoe Community College in Littleton to develop an extensive survey of the school community, in which parents, teachers and students were asked their opinions of the effectiveness of programs and procedures. The principal also conducted her own survey of staff to evaluate the "big picture" of what's working, what's not, and what leadership teachers need to support their instructional efforts. This information, along with ongoing informal evaluations, continues to provide direction for any adjustments or changes to the reform efforts. At Trailblazer, the evaluation process has meaning. "If we get data that show that something's not working, we're going to change," Smith declared.

The role of the district in ensuring this process, explained Waters, is important. "Part of the role [the district] can play," he said, "is to create time and space for the principal to be among teachers to ask the questions, 'Are we aligned? What was our plan for this year? What did we decide were the ways for accomplishing what we need to do, and how are we doing?'... For me, that is kind of an embedded piece of professional development."

Coordination of resources

The success of Trailblazer's reform effort depends heavily on the effective coordination of resources. The school began this process by involving all stakeholders, including parents and community members, in goal-setting and implementation.

School personnel then evaluated allocation of existing resources to determine where changes were necessary. From instructional resources such as staffing ratios and Title I funds, to support resources such

as professional development and materials, the school reallocated resources to those activities that contribute most to student learning. Allocation decisions were designed to ensure that all resources support the school's vision and mission, as detailed in the Trailblazer plan.

The school also receives financial support from various outside sources. In the use of federal funding such as Title I, Trailblazer benefited from recent legislation allowing districts to combine funds from different programs to encourage comprehensive reform. The school also receives several small grants, which support the implementation of enrichment programs, from the Douglas County Education Foundation. School-to-Career and Goals 2000 grants also help fund instructional programs, such as Paideia and the use of lead teachers.

Empowering staff

It may be a shared vision that cements the mosaic of school reform, but it is people who assemble it and make it work. The main facilitators of a successful, comprehensive school reform effort are the teachers. As stated by the Consortium for Policy Research in Education (1998), "Comprehensive reform works only when the individuals in the school are committed to the design, including the extra effort it takes to transform the school over a multiple-year time period into the design vision."

This requires giving personnel authority to schools and cooperating with teacher unions. A centralized system of teacher placement and transfer is incompatible with the flexibility schools need to develop their reforms. Not all teaching systems work with all teachers, and it is important that teachers believe in and feel comfortable with the systems they are using.

At Trailblazer, said Smith, this is not an issue, because the evaluation process and coaching allow staff members to move on when they grow in a different direction from the school. Smith also believes empowering teachers to be leaders is important to the success of reform. Each academy at Trailblazer has a lead teacher, who, in addition to being a mentor and coach for other teachers, is a liaison to the principal and assistant principal. The teacher evaluation process is closely aligned with components of the reform efforts, with a focus on assessing how the teacher achieves school goals.

A critical element of teacher empowerment is the principal's belief that all staff members are teachers, including custodians, secretaries and cafeteria personnel. "When I refer to teachers, I refer to everyone," Smith said. She lives out this policy by including classified staff in key leadership positions on school councils. Above all, the focus of a truly aligned reform program must always be on the learner — and how the school can best facilitate learning. This is not always easy or comfortable for staff. "Many things that we do here are not convenient for the adult," Smith explained. "But we're here for the kids."

This philosophy matches one of Waters' main points in describing a successfully aligned reform program. "There must be

"Comprehensive reform works only when the individuals in the school are committed to the design ..."

real clarity about the roles of teachers," he said. "Teaching occurs when students are learning. There aren't a lot of excuses. [In an aligned school] you don't hear people complaining about all the things they can't control. People are talking about what they can do."

Perhaps one teacher at Trailblazer best exemplified this sentiment in his response to an exercise at the school. When asked to complete the sentence, "I'm proud to be a Trailblazer Explorer because . . . ," he responded, "everything is done in the way that is best for children . . . Even when it is more difficult for us." ■

Biographical sketch — J. Timothy Waters

President and Executive Director of McREL Tim Waters is an expert in systemic change processes and in the implementation of effective school reform. During more than 25 years of experience in education, he has led efforts in reform at the district and state levels.

Waters' career has included experience as a superintendent, special advisor to the governor of Arizona, principal, dean of students and teacher. He co-founded the Institute for Peak Performing Schools in 1990 and led a seven-year effort in systemic reform in the Weld County Schools in Greeley, Colo. Currently Waters serves as a governor's appointee to the Colorado Commission on Higher Education.

Waters has received numerous awards and appointments over the years, including an appointment to the U.S. Department of Education's "Excellence in Elementary Education" school selection panel in 1986.

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